

FLORIDA STATE COLLEGE AT JACKSONVILLE

COLLEGE CREDIT COURSE OUTLINE

COURSE NUMBER: FIN 2125

COURSE TITLE: Estate Planning

PREREQUISITE(S): FIN 1122

COREQUISITE(S): None

CREDIT HOURS: 3

CONTACT HOURS/WEEK: 3

CONTACT HOUR BREAKDOWN:

Lecture/Discussion: 3

Laboratory:

Other _____:

FACULTY WORKLOAD POINTS: 3

STANDARDIZED CLASS SIZE
ALLOCATION: 25

CATALOG COURSE DESCRIPTION:

This course introduces students to the application of estate planning in personal financial planning. This course is designed to provide students with an understanding of the concepts of the fundamentals of estate planning, estate planning considerations and constraints, tools and techniques for general estate planning, and the tools and techniques for special estate planning situations.

SUGGESTED TEXT(S): Estate Planning and Taxation, Bost, Kendall/Hunt.Summary Review of CFP Estate Planning, Keir (800) 795-5347Multiple Choice Questions Workbook CFP Planning, Keir.

IMPLEMENTATION DATE: Fall Term, 2000

REVIEW OR MODIFICATION DATE: Fall Term, 2002 (20031)

COURSE TOPICS	CONTACT HOURS <u>PER TOPIC</u>
I. Estate Planning Overview	6
II. Considerations and Constraints in Estate Planning	21
III. Estate Planning Tools and Techniques (General)	10
IV. Estate Planning Tools and Techniques (Specific)	5
V. Final Exam	3

PROGRAM TITLE: Financial Services (Financial Planning Associate)
 COURSE TITLE: Estate Planning
 CIP NUMBER: 0206.030100

LIST PERFORMANCE STANDARD ADDRESSED:

NUMBER(S): TITLES(S):

- 11.0 DEMONSTRATE PROFICIENCY IN ECONOMIC PRINCIPLES--The student will be able to:
- 11.01 Demonstrate knowledge of how the federal reserve system operates.
 - 11.02 Comprehend the documents and language of financial institutions.
- 12.0 DEMONSTRATE PROFICIENCY IN BUSINESS LAW--The student will be able to:
- 12.01 Understand federal and state regulations and examination of financial institutions.
- 13.0 DEMONSTRATE PROFICIENCY IN MONEY AND FINANCE--The student will be able to:
- 13.01 Explain production, consumption, GNP, and business cycles.
 - 13.02 Compare banks and thrifts.
 - 13.03 Demonstrate knowledge of commercial banking.
 - 13.04 Understand the federal reserve system and commercial bank interrelationships.
 - 13.05 Define money and its function and describe measures of money.
 - 13.06 Explain current trends in financial services deregulation and diversified financial services.
 - 13.07 Differentiate among corporation and other forms of business.
 - 13.08 Understand the details of a corporate charter and bylaws.
 - 13.09 Comprehend the various means of acquiring capital and subsequent equity and debt functions.
 - 13.10 Exhibit knowledge of securities markets and SEC regulations.
 - 13.11 Demonstrate knowledge about business failure, reorganization, dissolutions, and liquidation.
 - 13.12 Explain the purpose of statement analysis.
 - 13.13 Define and explain items in a financial statement.
 - 13.14 Demonstrate the ability to interpret and analyze a financial statement.