CONTACT INFORMATION

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REQUIRED RESOURCES


OTHER: Financial calculator, good internet connection, webcam and headset

OPTIONAL RESOURCE

RESOURCE GUIDE: JOURNAL OF FINANCIAL PLANNING, In-depth articles on various topics in financial planning.
http://www.journalfp.net/
WALL STREET JOURNAL or Business Section of your local paper

COURSE PROCEDURE AND POLICY

We employ a hybrid approach (both face-to-face and online) to teach this class. Face-to-face classes comprise 12 hours, including two Saturdays. Saturday classes are from 8:00 a.m. – 2:00 p.m. Online classes comprise 13 hours. Online meetings may include both one-on-one time with the instructor and meetings with the entire class. Students will need a good internet connection, a webcam and a headset for online meetings. Students must attend all face-to-face meetings and all required online meetings. The textbook, calculator and course packet are required for each face-to-face meeting.
GRADES

Exam 1: 30% of final grade – 30 questions – online – 70 minutes

Exam 2: 30% of final grade – 30 questions – online – 70 minutes

Exam 3: 40% of final grade – 40 questions – online – 90 minutes

70% is required to pass this course.

COURSE OBJECTIVES

Upon completion of this course, students will:
- Demonstrate knowledge of the principles and concepts of the foundations of financial planning.
- Demonstrate competency comprehending, interpreting, and utilizing credit and insurance management practices.
- Identify, describe and apply retirement and estate planning principles proficiently.
- Apply the CFP Board Financial Planning Practice Standards to the financial planning process.

COURSE SCHEDULE

<table>
<thead>
<tr>
<th>Week</th>
<th>Day</th>
<th>Mode</th>
<th>Topics</th>
<th>Assignment</th>
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<tbody>
<tr>
<td>1</td>
<td>Friday</td>
<td>O</td>
<td>Personal Financial Planning Environment - function, purpose and regulation of financial institutions</td>
<td>Ch. 1 &amp; 2 Problems</td>
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<tr>
<td>2</td>
<td>Friday</td>
<td>O</td>
<td>Time value of money concepts and calculations Education planning</td>
<td>Ch. 6 &amp; 7 Problems</td>
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<td></td>
<td>Saturday</td>
<td>F2F</td>
<td>Financial planning for special circumstances – Risk Management</td>
<td>Ch. 8, 9, 10 Problems Exam 2 (Chs. 6-10)</td>
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<tr>
<td>3</td>
<td>Saturday</td>
<td>F2F</td>
<td>Financial planning for special circumstances – Investment Planning, Retirement Planning, Estate Planning</td>
<td>Ch. 12, 15, 17 Problems</td>
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<tr>
<td>4</td>
<td>Friday</td>
<td>O</td>
<td>Financial services regulations and requirements</td>
<td>Ch. 18 &amp;19 Problems Exam 3 (Chs. 12, 15, 17, 18, 19)</td>
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