

COURSE SYLLABUS – BADM 320
PERSONAL FINANCIAL PLANNING
Spring I Term 2012

Instructor: Dr. James D. Harriss

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Required Materials: A *Financial* calculator (TI BA2-Plus recommended). Also, some type of access to the Wall Street Journal for daily readings and potential project assignment.

Required Text: *Personal Financial Planning*, 11th Edition. Gitman & Joehnk, authors. Dryden Press, publishers - 2008.

- 1.) **COURSE DESCRIPTION:** Current issues in finance as they relate to personal financial and investment topics including private needs for investment capital. The course focuses on existing theories, concepts and practices with emphasis on new and emerging topics in the field. Course materials will be principally from lecture and assigned homework. Text is to be used as primary reference and background resource, however significant material will be introduced in class to augment text presentations. Tests will be primarily problem-oriented, and reflect problems assigned and covered in class.
- 2.) **INCOMING COMPETENCY OF STUDENT EXPECTED BY INSTRUCTOR:** Students will be able to master basic arithmetic functions and use of present and future value tables. The calculator usage will be taught in class.
- 3.) **COURSE STATEMENT OF OBJECTIVES:**
 - A.) To understand the process of financial and investment planning.
 - B.) To understand the basics of investments, insurance, and financial planning, including risks, characteristics, tax consequences, and implications for retirement.
 - C.) To be able to develop and monitor their personal financial plans and investments.

COURSE SCHEDULE

Week 1: Chapters 1-3.

Week 2: Chapters 4 & 5.

Week 3: Chapters 6 – 8.

Week 4: Midterm Exam

Week 5: Chapters 9 & 10.

Week 6: Chapters 11 & 13.

Week 7: Chapters 14 & 15.

Week 8: cont...

Week 9: Final Exam

NOTE: Problems at the end of each chapter will be assigned the prior class and discussed and solved the class period they are due. It is *highly* recommended that these problems be worked or attempted prior to the class they will be discussed. Further, class attendance is expected and required - 2 absences constitute potential grade reductions or withdrawal from class.

