

## Student Learning Outcomes for the Certificate in Personal Financial Planning

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| <b>Student Outcomes for the Certificate Program in Personal Financial Planning</b> | <b>FSHS 624</b> | <b>FSHS 760</b> | <b>FSHS 762</b> | <b>FSHS 764</b> | <b>FSHS 766</b> | <b>FSHS 772</b> |
|--|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Understand the fundamentals of the financial planning process                      | a,b,d<br>K,S    | a,b<br>K,S      | a,b<br>K,S      | a,b<br>K,S      | a,b<br>K,S      | a,b<br>K,S      |
| Calculate and interpret the time value of money                                    | a,b,d<br>K,S    | a,b<br>K,S      | a,b<br>K,S      | a,b<br>K,S      | a,b<br>K,S      | a,b<br>K,S      |
| Develop a clear professional understanding of insurance policies and strategies    | a,b,d<br>K,S    | a<br>K,S        | a<br>K,S        | a<br>K,S        | a<br>K,S        | a<br>K,S        |
| Understand risk management concepts  | a,b,d<br>K,S    | a<br>K,S        | a<br>K,S        | a<br>K,S        | a, b, d<br>K,S  | a<br>K,S        |
| Apply tax planning strategies to meet the goals of the client.                     | a,b<br>K,S      | a<br>K,S        | a<br>K,S        | a<br>K,S        | a<br>K,S        | a,b,d<br>K,S    |

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|--|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Become skilled in applying retirement planning strategies                            | a<br>K,S        | a,b<br>K,S      | a<br>K,S        | a<br>K,S        | a<br>K,S        | a<br>K,S        |
| Develop estate planning strategies for the benefit of clients.                       | a<br>K          | a<br>K,S        | a<br>K,S        | a,b<br>K,S      | a<br>K,S        | a<br>K,S        |
| Develop investment planning strategies to assist clients in meeting financial goals. |                 |                 | a,b,d<br>K, S   |                 |                 |                 |
| Apply knowledge to help others meet challenges.                                      | a,b,d           | a               | a               | a               | a               | a               |
| Solve real world problems.   | a,b,d           | a,b             | a,d             | a               | a               | a               |
| Develop financial plans for clients with a variety of needs.                         |                 |                 |                 |                 |                 |                 |

## Student Learning Outcomes for the Certificate in Personal Financial Planning

| Student Outcomes for the<br>Certificate in Personal Financial<br>Planning   | FSHS<br>624 | FSHS<br>760 | FSHS<br>762 | FSHS<br>764 | FSHS<br>766 | FSHS<br>772 |
|---|-------------|-------------|-------------|-------------|-------------|-------------|
| Develop and refine communication skills.  | b           | b           | b           | b           | b           | b           |
| Demonstrate standards of ethical conduct which adhere to the Code of Ethics and Professional Responsibility developed by the Certified Financial Planner Board of Standards | a,b         |             |             |             |             |             |
| Obtain an understanding of 21 <sup>st</sup> Century technologies.   | d           | d           | d           | d           | d           | d           |

a = written examinations

b = written assignments (including case studies)

d = out-of-class activities

K = knowledge assessment

S = skills assessment