Note:

Course content may be changed, term to term, without notice. The information below is provided as a guide for course selection and is not binding in any form, and should not be used to purchase course materials.
COURSE SYLLABUS

BUSI 352
FINANCIAL AND RETIREMENT PLANNING

COURSE DESCRIPTION
This course is designed to provide an overview of the financial planning process with specific emphasis of retirement planning. Topics discussed will include client/planner interactions; time value of money applications; personal financial statements development and assessment; cash flow and debt management; asset acquisition; education planning; planning elements of risk management; investment planning; and retirement planning; special needs planning review; integrating planning recommendations; financial planning ethics review; overview of practice management concepts.

RATIONALE
This is the first course in the Certified Financial Planner (CFP) program. The course provides an overview of a variety of financial planning topics with a special emphasis on retirement planning. The purpose of the course is to provide a foundation for subsequent course work in the CFP® program and to prepare students to take the national CFP® examination to become a Certified Financial Planner.

I. PREREQUISITE
For information regarding prerequisites for this course, please refer to the Academic Course Catalog.

II. REQUIRED RESOURCE PURCHASE
Click on the following link to view the required resource(s) for the term in which you are registered: http://bookstore.mbsdirect.net/liberty.htm

III. ADDITIONAL MATERIALS FOR LEARNING
A. Computer with basic audio/video output equipment
B. Internet access (broadband recommended)
C. Microsoft Word
   (Microsoft Office is available at a special discount to Liberty University students.)

IV. MEASURABLE LEARNING OUTCOMES
Upon successful completion of this course, the student will be able to:
A. Demonstrate the importance of the time value of money in financial and retirement planning.
B. Identify the economic, social, political, and technological environments impacting financial planning.
C. Explain how financial plans should accommodate existing economic, social, political, and technological environments.

D. Identify the processes for helping clients achieve their financial goals.

E. Recognize the use of credit and planned borrowing to meet household consumption, asset acquisition and other financing needs.

F. Select the advantages and disadvantages of credit and borrowing to the financial planning process.

G. Identify strengths and weaknesses in a client’s initial situation while determining solutions for these weaknesses.

H. Explain what Scripture says about the role of money and possessions in the life of a Christian.

V. COURSE REQUIREMENTS AND ASSIGNMENTS

A. Textbook readings and lecture presentations/notes

B. Course Requirements Checklist

   After reading the Syllabus and Student Expectations, the student will complete the related checklist found in Module/Week 1.

C. Discussion Board Forums (4)

   The student will participate in 4 Discussion Board Forums by submitting a 400-word thread demonstrating course-related and biblical knowledge to each of the instructor's prompts. Each thread will be supported by at least 2 citations from current academic journals. In addition to the thread, the student is required to reply to 2 other classmates’ threads. Each reply will be 200 words and have at least 1 citation from current academic journals. Current APA formatting must be used for both threads and replies.

D. Case Studies (2)

   The student will complete two Case Studies in this course. Current APA formatting must be used.

E. Quizzes (8)

   There will be weekly quizzes in this course. Each quiz will contain 15 multiple-choice and true/false questions, and have a time limit of 40 minutes.

F. Mid-term Exam

   The Mid-term Exam will cover the Reading & Study materials assigned during modules/weeks 1-4. This will consist of 75 multiple-choice and true/false questions, and have a 2 hour time limit.

G. Final Exam

   The Final Exam will cover the Reading & Study materials assigned during modules/weeks 5-8. This will consist of 75 multiple-choice and true/false questions, and have a 2 hour time limit.
VI. COURSE GRADING AND POLICIES

A. Points

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Requirements Checklist</td>
<td>10</td>
</tr>
<tr>
<td>Discussion Board Threads (4 at 55 pts ea)</td>
<td>220</td>
</tr>
<tr>
<td>Discussion Board Replies (4 at 30 pts ea)</td>
<td>120</td>
</tr>
<tr>
<td>Case Study 1</td>
<td>50</td>
</tr>
<tr>
<td>Case Study 2</td>
<td>70</td>
</tr>
<tr>
<td>Quizzes (8 at 30 pts ea)</td>
<td>240</td>
</tr>
<tr>
<td>Mid-term Exam</td>
<td>150</td>
</tr>
<tr>
<td>Final Exam</td>
<td>150</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1010</strong></td>
</tr>
</tbody>
</table>

B. Scale

A = 900–1010  B = 800–899  C = 700–799  D = 600–699  F = 0–599

C. Late Assignment Policy

If the student is unable to complete an assignment on time, then he or she must contact the instructor immediately by email.

Assignments that are submitted after the due date without prior approval from the instructor will receive the following deductions:

1. Late assignments submitted within one week of the due date will receive a 10% deduction.
2. Assignments submitted more than one week late will receive a 20% deduction.
3. Assignments submitted two weeks late or after the final date of the class will not be accepted.
4. Late Discussion Board threads or replies will not be accepted.

Special circumstances (e.g. death in the family, personal health issues) will be reviewed by the instructor on a case-by-case basis.

D. Disability Assistance

Students with a documented disability may contact Liberty University Online’s Office of Disability Academic Support (ODAS) at LUOODAS@liberty.edu to make arrangements for academic accommodations. Further information can be found at www.liberty.edu/disabilitysupport.
### COURSE SCHEDULE

**BUSI 352**


<table>
<thead>
<tr>
<th>MODULE/WEEK</th>
<th>READING &amp; STUDY</th>
<th>ASSIGNMENTS</th>
<th>POINTS</th>
</tr>
</thead>
</table>
| 1           | Dalton et al.: chs. 1–2 1 presentation | Course Requirements Checklist  
Class Introductions  
DB Forum 1 Thread  
Quiz 1 | 10  
0  
55  
30 |
| 2           | Dalton et al.: chs. 3–4 1 presentation | DB Forum 1 Replies  
Quiz 2 | 30  
30 |
| 3           | Dalton et al.: chs. 5–6 1 presentation | DB Forum 2 Thread  
Quiz 3 | 55  
30 |
| 4           | Dalton et al.: chs. 7–8 1 presentation | DB Forum 2 Replies  
Quiz 4  
Midterm Exam | 30  
30  
150 |
| 5           | Dalton et al.: chs. 9–11 1 presentation | DB Forum 3 Thread  
Case Study 1  
Quiz 5 | 55  
50  
30 |
| 6           | Dalton et al.: chs. 12–13 1 presentation | DB Forum 3 Replies  
Quiz 6 | 30  
30 |
| 7           | Dalton et al.: chs. 14, 17 1 presentation | DB Forum 4 Thread  
Case Study 2  
Quiz 7 | 55  
70  
30 |
| 8           | Dalton et al.: chs. 15–16, 18 1 presentation | DB Forum 4 Replies  
Quiz 8  
Final Exam | 30  
30  
150 |
| **TOTAL**   |                  |                                                  | **1010** |

DB = Discussion Board

**NOTE:** Each course module/week begins on Tuesday morning at 12:00 a.m. (ET) and ends on Monday night at 11:59 p.m. (ET). The final module/week ends at 11:59 p.m. (ET) on **Friday**.