

**Class Overview**

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| **General Class Information**  *All fields must be completed and posted in UVaCollab and World Viewable in SIS no later than two weeks prior to registration.* | | | | | | | | |
| **Subject Area &**  **Catalog Number** | NCPR 500-701 | **Class Title** | PERSONAL FINANCIAL PLANNING | | | | |
| **Credit Type** | **Undergraduate**  **Graduate** | | **Credit**  **Noncredit** | | **Delivery Method** | **P (In-Person)**  **CI (Classroom/Internet)**  **WB (Web-Based)** | |
| **Re-licensure**  **Re-certification Points** | 0 | | | **Approval Date**  *(For internal use only)* | | |  | |

1. **Class Description (Use the SIS 400 characters from catalog description)**

INTRODUCES THE CONCEPTS OF THE FINANCIAL PLANNING

PROCESS, CLIENT/PLANNER INTERACTIONS, TIME VALUE OF

MONEY APPLICATIONS, PERSONAL FINANCIAL STATEMENTS

DEVELOPMENT AND ASSESSMENT, CASH FLOW AND DEBT

MANAGEMENT, AND ASSET ACQUISITION. OTHER TOPICS

AND AN OVERVIEW OF PRACTICE MANAGEMENT CONCEPTS

WILL BE DISCUSSED. PREREQUISITES: FINANCIAL ACCOUNTING,

MACROECONOMICS, STATISTICS.

1. **Learning Outcomes**

1. **Assessment Components**

THREE TESTS

1. **Required Text (include ISBN, specific edition)**

MICHAEL A. DALTON, FUNDAMENTALS OF FINANCIAL PLANNING (2013), 3RD ED. MONEY EDUCATION. ST. ROSE, LA.

1. **Required Additional Resources and Technical Components**

HP12-C BUSINESS CALCULATOR

1. **Other Class Expectations (for Classroom/Internet and Web-Based classes, specify any live (synchronous) meetings dates, times, delivery mode)**