

**GRANDE PRAIRIE REGIONAL COLLEGE**  
**DEPARTMENT OF BUSINESS ADMINISTRATION**  
**COURSE OUTLINE**

**BA 2700 3 (3-0-0) PERSONAL FINANCIAL PLANNING**

**Course  
Description:**

Personal Financial Planning provides students with the fundamentals of financial planning. Topics include financial objectives and money management, the financial planning process, tax planning, financing, investment products and planning, estate planning, retirement planning and risk management.

**Prerequisites:**

BA 1050 and BA 1110 or consent of the instructor.

**Text:**

Course material from the Canadian Institute of Financial Planning's Retirement Planning web based course.

**Course Objectives:**

The course transfers to the Canadian Institute of Financial Planning's Retirement Planning 201 course. Students must write the Institute's exam and assignments to receive credit with the Institute. The GPRC exams are for college credit only. At the conclusions of sections students will do a web based assessment. Marks from these assessments should be supplied to the instructor for assignment marks.

<b>Grading</b>	Midterm exam	30%
	Assignments (4% each)	40%
	Final exam	30%

<b>Instructor:</b>	Jeff Nutting	Tel	539-2815
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**Course Content:**

1. Personal Financial Planning
2. Retirement Planning
3. Government Sponsored Retirement Income Programs
4. Employer Sponsored Pension Plans
5. Deferred Profit Sharing Plans and Registered Retirement Savings Plans
6. Registered Retirement Income Funds, Life Income Funds and Locked In Retirement Income Funds
7. Education Planning
8. Taxation during Retirement
9. Retirement Savings Plans
10. Post Retirement Planning
11. Retirement Decisions
12. Review