

# Business Administration

Course Number:	BUAD 235
Course Title:	WEALTH MANAGEMENT AND ESTATE PLANNING
Credits:	3
Calendar Description:	This course examines market indicators in relation to wealth management and estate planning and progresses to an understanding of investment products. Prerequisites: BUAD 251; MATH 114

Corequisite(s):	No
Prerequisite to:	No
Final Exam:	Yes
Hours per week:	3
Graduation Requirement:	Required ±Financial Services option
Substitutable Courses:	Students with credit for BUAD 253 or BUAD 254 cannot take BUAD 235 for further credit.
Transfer Credit:	
Special Notes:	This course is recognized by Advocis as satisfying one element of the educational requirements which must be met in order to write the FPE1 exam, the first of two required to obtain licensing as a CFP.
Development Date:	November 2012
Revision Date:	November 2013

Professors

Rich Turley	Email only please	Kelowna: B209	<a href="mailto:rjturley@okanagan.bc.ca">rjturley@okanagan.bc.ca</a>

Learning Outcomes

Upon completion of the course students will be able to

## Evaluation Procedure

Term Work	20%
Mid-term Exam	30%
Final Exam	50%
Total	100%

## Notes

**Certified Financial Planner License:**

The Financial Planning Standards Council oversees the granting of the Certified Financial Planner license. This course qualifies for educational credit with Advocis. Students who wish to write the exams for the CFP license must complete a qualifying educational program. Your professor will provide you with more information on appropriate course selection at Okanagan College to meet the requirements for educational credits with Advocis.

## Required Texts/Resources

CCH Canada Limited: Wealth Management and Estate Planning, 5th Edition 2013  
\*\* TEXT IS ORDERED THROUGH ADVOCIS ±PLEASE SEE COURSE MOODLE SHELL FOR INSTRUCTIONS \*\*

Courses in the financial services area frequently require the use of a financial calculator and you are required to be proficient in the use of such a calculator. The Texas Instruments BAII+ is the most commonly used in OC business courses and is well suited to the requirements of this course.

Course Schedule

	Tuesday, Jan Classes begin Family Day Feb 13 & Feb 14 to 17 Reading Break ±no classes Mon. Apr 10 Last day of regularly scheduled classes Good Fri. April 14 Easter Mon. April 17 ±no exams	
Jan 3	Introduction - Financial Planning Concepts RESP	Module 18, Unit 1
Jan 10	Debt Management Charitable Giving	Module 18, Unit 2 Module 18, Unit 3
Jan 17	Introduction to Estate Planning / POA Estate & Wills	Module 19, Unit 1 Module 19, Unit 2
Jan 24	Intestate Probate	Module 19, Unit 3 Module 19, Unit 4

Probate Module 19,

Jan 31

## SKILLS ACROSS THE BUSINESS CURRICULUM

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The Okanagan School of Business promotes core skills across the curriculum. These skills include reading, written and oral communications, computers, small business, and academic standards of ethics, honesty and integrity.

## STUDENT CONDUCT AND ACADEMIC HONESTY

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What is the Disruption of Instructional Activities?

At 2NDQDJDQ &ROOHJH 2& GLVUXSWLRQ RI LQVWUXFWLRQDO DFWLYLWLH examinations, lectures, seminars, tutorials, group meetings, other related activities, and with students using the study IDFLOLWLHV as a result that leads to property damage, assault, discrimination, harassment and fraud. Penalties for disruption of instructional activities include a range of sanctions from a warning and/or a failing grade on an assignment, examination or course to suspension from OC.

What is Cheating?

<sup>3</sup>&KHDWLQJ LQFOXGHV EXW LV QRW OLPLWHG WR GLVKRQHVV RU DWWHPSWH use is made of books, notes, diagrams or other aids excluding those authorized by the examiner. It includes communicating with others for the purpose of obtaining information, copying from the work of others and purposely exposing or conveying LQIRUPDWLRQ WR RWKHU VWXGHQWV ZKR DUH WDNLQJ WKH WHVW RU H[DPLQ Students must submit independently