

Accredited by AACSB International The Association to Advance Collegiate Schools of Business

INSTRUCTOR: Mr. Todd Broker

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IV. COURSE OUTLINE :

- I. FOUNDATIONS OF FINANCIAL PLANNING
 - A. *Chapter 1: Understanding the Financial Planning Process*
 - B. *Chapter 2: Developing Your Financial Statements & Plans*
 - C. *Chapter 3: Preparing Your Taxes*

- II. MANAGING BASIC ASSETS
 - D. *Chapter 4: Managing Your Cash & Savings*
 - E. *Chapter 5: Making Automobile & Housing Decisions*

- *First Exam ***TBD***

- III. MANAGING INSURANCE NEEDS
 - F. *Chapter 8: Insuring Your Life*

- IV. MANAGING INVESTMENTS
 - G. *Chapter 11: Investment Planning*
 - H. *Chapter 12: Investing In Stocks and Bonds*
 - I. *Chapter 13: Investing in Mutual Funds, Exchange Traded Funds & Real Estate*

- V. RETIREMENT
 - J. *Chapter 14: Planning for Retirement*

* Second Exam ***TBD***

*This outline is subject to revision during the course of the semester.

VIII . EVALUATION AND GRADING PROCEDURES:

Grades will be determined as follows:

Exam1	25%
Exam2	25%
Reading Quizzes / Homework	25%

able to show exceptional reason why she or he could not complete the assignment at the VFKHGXOHG WLP H , W LV WKH VWXGH QW of their VSRQVLE L circumstance.

Financial Planning Projects: At the end of each unit there will be a case study for the student to complete. Each case study will consist of financial scenarios that the students must solve by applying the various principles they learned in previous chapters. Then, at the end of the course, students will be required to participate in an online personal finance game called *Gen i Revolution*: <http://www.genirevolution.org/>

IX. ATTENDANCE POLICY:

Prompt, professional attendance is expected for all classes. Students are expected to conduct themselves in a professional manner. Unprofessional language and/or behavior will not be tolerated and could result in the student being dropped from the class. Please turn off cellular phones, beepers, or pagers when entering the classroom. Text messaging during class is not acceptable. Tardiness to class, talking to other students during lecture, cell phones going off during class, etc. are not considered professional.

Students are also expected to participate in class discussions and exercises to the best of their ability. Seats will be assigned by the instructor on the first day of class and attendance will be recorded every class period and the instructor will make note of class participation, tardiness, and other issues.

6WXGHQWV VKRXOG EH IDPLOLD policy as stated in the 8 QLYHUVLV current 2009-2011 Murray State University Undergraduate Bulletin. The Bulletin notes WZR EURDG FDWHJRULHV RI ³H[FVHG' DEVHQFHV

1. ³EVHQFH GXH WR SHUVRQDO LOOQHVV RU GHDWK LQ extraordinary personal circumstance. Faculty may require appropriate authentication RU GRFXPHQDWLRQ
2. ³EVHQFH GXH WR VWXGHQW SDUWLFLSDWLRQ LQ D 8 VWXGHQW VHUYHV DV D UHSUHVHQDWLYH RI WKH LC

Note: Students with excused absence are excused from class attendance but are not excused from work assigned or expected as a part of that class period. The nature of this class is such that those who choose to attend will benefit and those who choose not to attend will face great difficulty. In other words, absenteeism will not explicitly be calculated into your grade; however those who do not attend will be at a severe disadvantage.

X. ACADEMIC HONESTY POLICY :

Murray State University takes seriously its moral and educational obligation to maintain high standards of academic honesty and ethical behavior. Instructors are expected to ensure that work submitted by students is authentic and the result of their own efforts, and consistent with established academic standards. Students are obligated to respect and abide by the basic standards of personal and professional integrity.

Violations of Academic Honesty include:

Cheating - Intentionally using or attempting to use unauthorized information such as books, notes, study aids, or other electronic, online, or digital devices in any academic exercise; as well as unauthorized communication of information by any means to or from others during any academic exercise.

Fabrication and Falsification - Intentional alteration or invention of any information or citation in an academic exercise. Falsification involves changing information whereas fabrication involves inventing or counterfeiting information.

Multiple Submission -

that actions have taken place that may be in violation of Murray State University Non-Discrimination Statement, this process must be suspended and the matter be directed to the Office of Equal Opportunity. Any appeal will be forwarded to the appropriate university committee as determined by the Provost.

For this class, students caught being academically dishonest will receive a ZERO on the assignment in question. If another instance of academic dishonesty occurs, the student will automatically FAIL the course. If the disciplinary action results in the awarding of a grade of E in the course, the student(s) may not drop the course.

XI. NON-DISCRIMINATION POLICY STATEMENT:

Murray State University endorses the intent of all federal and state laws created to prohibit discrimination. Murray State University does not discriminate on the basis of race, color, national origin, gender, sexual orientation, religion, age, veteran status, or disability in

ASSURANCE OF LEARNING

Bachelor of Arts in Business (BAB) and Bachelor of Science in Business (BSB) programs: Graduates of the Bachelor of Arts in Business (BAB) and Bachelor of Science in Business (BSB) programs shall be able to:

Goal 1: Fundamental Knowledge

¾ Demonstrate a fundamental knowledge of the core business disciplines.

Goal 2: Problem-Solving and Decisionmaking

¾ Demonstrate effective problem solving and decision making skills in business situations.

Goal 3: Information Technology

¾ Apply information technology tools appropriately in the analysis of business problems.

Goal 4: Ethical Issues

¾ Perform a structured analysis of ethical issues in business.

Goal 5: Global and Multicultural Dimensions

¾ Demonstrate knowledge of the global and multicultural dimensions of the modern business environment.

Goal 6: Oral and Written Communication

¾ Communicate effectively in oral and written formats.

Goal 7: Foreign Language Bachelor of Arts in Business Programs Only

¾ Understand, speak, read, and write a second language at the intermediate level.