Course Title:	**Personal Financial Planning**

Course Number and Section:

MOS	2277A 550

Instructor Name(s):   Muhammad Shuja

Instructor Email(s):   mshuja@uwo.ca

Disclaimer: Information in the brief course outline is subject to change. The syllabus posted on OWL is the official and authoritative source of information for the course.

Course Description:

This course is designed to give students the tools necessary to manage their own finances over their lifetime. It would be of interest to anyone who plans to have a job, buy a car, buy a house, have a family, and retire to a comfortable life. Topics to be covered include the fundamental principles of finance, financial goal setting, budgeting, tax planning, cash management, personal credit, investment planning, insurance planning, along with a basic understanding of financial markets and institutions.

Learning Outcomes:

Completing this course successfully enable the student to understand:
Personal financial plan, including application of time value of money and use of tax concepts.
Money management including banking services/money management and personal credit.
Quantitative and qualitative analysis of scenarios like buy verses rent for house and lease verses finance for car.
Risk management related to house, health and life through insurance.
Fundamental concepts of investments, and investment option like bond, shares and mutual funds.
Retirement saving/retirement income planning and estate planning.

Textbooks and Course Materials:

Personal Finance; Jeff Madura & Hardeep Singh Gill; 4th Canadian Edition; Pearson Canada

Required Financial Calculator: Texas Instrument BA II Plus

Methods Of Evaluation:

Assignment	Due Date mm/dd/yy	Weight - %
Participation		10

Assignment	Due Date mm/dd/yy	Weight - %
Midterm Exam		40
Quiz		10
Final Exam		40

In solidarity with the Anishinaabe, Haudenosaunee, Lūnaapéewak, and Chonnonton peoples on whose traditional treaty and unceded territories this course is shared.

Thursday, April 11, 2024