

Huron Brief Course Outlines

Fall/Winter 2023-2024

Course Title: Personal Financial Planning

Course Number and Section

MOS

2277A - 550

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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.

Learning Outcomes:

Goal Setting
Understanding the importance of the time value of money
Budgeting
Savings & Emergency Funds
Basics of Personal Income Tax
Fundamentals of RRSPs & TFSAs
Buying/Owning a Home
Mortgages
Buying/Owning Rental Properties
Understanding Banking as a Tool
Debt & Credit
Owning a Car
Home & Auto Insurance
Life & Health Insurance
Investing Fundamentals
Stocks, Bonds, Mutual Funds & ETFs
Active vs. Passive Investing

Asset Classes & Historical Performance

Safe Portfolio Decumulation

Textbooks and Course Materials:

Madura, Jeff; Gill, Hardeep Singh, Personal Finance, 5th Canadian Edition, Pearson
ISBN 9780136662594.

Methods of Evaluation:

Assignment	Due Date mm/dd/yy	Weight - %
Success Assignment	10/01/23	8%
Budget Assignment	11/19/23	12
Midterm Exam	10/20/23	40
Final Exam	TBD	40

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