

STUDENT LEARNING OUTCOMES PERSONAL FINANCIAL PLANNING – B.S.

SLO: Knowledge: Students will demonstrate a depth of knowledge and apply the methods of inquiry in personal financial planning, and they will demonstrate a breadth of knowledge across their discipline. Student outcomes associated with this SLO are listed below.

- Understand the fundamentals of the financial planning process.
- Calculate and interpret the time value of money.
- Develop a clear, professional understanding of insurance policies and strategies.
- Understand risk management concepts.
- Apply tax planning strategies to meet the goals of the client.
- Become skilled in applying retirement planning strategies.
- Develop estate planning strategies for the benefit of clients.

SLO: Critical Thinking: Students will be able to interpret information, respond and adapt to changing situations, make complex decisions, solve problems, and evaluate actions.

- Apply knowledge to help others meet challenges.
- Solve real world problems.
- Develop financial plans for clients with a variety of needs.

SLO: Communication: Students will be able to communicate clearly and effectively.

- Develop and refine communication skills.

SLO: Diversity: Students will demonstrate the awareness, understanding, and skills necessary to live and work in a diverse world.

- Work in multidisciplinary and diverse teams.

SLO: Ownership for Learning: Students will demonstrate the inclination to be life-long learners, a concern to become and remain well informed, the ability to retrieve and manage information appropriately, open-mindedness regarding world views, and a willingness to reconsider and revise their own views when warranted.

- Participate in professional groups and activities.

SLO: Personal and Professional Development: Students will practice professional ethics, demonstrate personal and social responsibility, provide leadership in interactions with peers, and work effectively as team members.

- Learn and demonstrate leadership skills.
- Demonstrate standards of ethical conduct which adhere to the Code of Ethics and Professional Responsibility developed by the Certified Financial Planner Board of Standards.
- Obtain an understanding of 21st Century technologies.