Code # BU02(Rev)

**New/Special Course Proposal-Bulletin Change Transmittal Form**

**Undergraduate Curriculum Council** - Print 1 copy for signatures and save 1 electronic copy.

**Graduate Council** - Print 1 copy for signatures and send 1 electronic copy to [mmcginnis@astate.edu](mailto:mmcginnis@astate.edu)

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| --- |
| **New Course or**  **Special Course (Check one box)**  *Please complete the following and attach a copy of the catalogue page(s) showing what changes are necessary.* |

|  |  |
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| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Enter date… **Department Curriculum Committee Chair** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Enter date…  **COPE Chair (if applicable)** |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Enter date… **Department Chair:** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Enter date…  **General Education Committee Chair (If applicable)** |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Enter date… **College Curriculum Committee Chair** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Enter date…  **Undergraduate Curriculum Council Chair** |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Enter date… **College Dean** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Enter date…  **Graduate Curriculum Committee Chair** |
|  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Enter date…  **Vice Chancellor for Academic Affairs** |

1. Proposed Course Prefix and Number (For variable credit courses, indicate variable range.)

FIN 2013

2. Course Title – if title is more than 30 characters (including spaces), provide short title to be used on transcripts. Title cannot have any symbols (e.g. slash, colon, semi-colon, apostrophe, dash, and parenthesis). Please indicate if this course will have variable titles (e.g. independent study, thesis, special topics).

Personal Asset Management

3. Will this course be lecture only, lab only, lecture and lab, activity, dissertation, experiential learning, independent study, internship, performance, practicum, recitation, seminar, special problems, special topics, studio problems, student exchange, occupational learning credit, or course for fee purpose only (e.g. an exam)? Please choose one.

Lecture

4. What is the grade type (i.e. standard letter, credit/no credit, pass/fail, no grade, developmental)?

Standard

5. Is this course dual listed (undergraduate/graduate)?

No

6. Is this course cross listed? (If it is, all course entries must be identical including course descriptions. It is important to check the course description of an existing course when adding a new cross listed course.)

No

7. Brief course description (40 words or fewer) as it should appear in the bulletin.

The use of financial assets as vehicles for saving for the future, investments in combinations of assets to meet financial objectives, and how the financial objectives will change over the life span of the investor.

8. Indicate all prerequisites and if this course is restricted to a specific major, which major. (If a student does not have the prerequisites or does not have the appropriate major, the student will not be allowed to register).

a. Are there any prerequisites?

NO

b. Why?

Entry level course

9. Course frequency(e.g. Fall, Spring, Summer). Not applicable to Graduate courses.

Fall and Spring

10. Contact Person (Name, Email Address, Phone Number)

Dr. Philip Tew, [ptew@astate.edu](mailto:ptew@astate.edu), 870-972-3742

11. Proposed Starting Term/Year

Fall, 2014

12. Is this course in support of a new program? Yes

If yes, what program?

Minor in Financial Wealth Management

13. Does this course replace a course being deleted? NO

If yes, what course?

Enter text...

Has this course number been used in the past? NO

*Submit Course Deletion Proposal-Bulletin Change Transmittal Form.*

14. Does this course affect another program? NO

If yes, provide contact information from the Dean, Department Head, and/or Program Director whose area this affects.

Enter text...

15. Justification should include:

a. Academic rationale and goals for the course (skills or level of knowledge students can be expected to attain)

This course provides an entry-level course for both business and non-business students in the area of personal asset management, including an overview of investments (real and financial),.

b. How does the course fit with the mission established by the department for the curriculum? If course is mandated by an accrediting or certifying agency, include the directive.

The College of Business’ mission is to provide a high quality management education by emphasizing among other factors – decision tools and leadership. This course will provide students with the basic knowledge necessary to analyze and make initial decisions as it relates to their own personal asset management, and begin to focus on leadership skills necessary to manage others’ assets.

c. Student population served.

Business and non-business students interested in managing their personal assets or assets of others.

d. Rationale for the level of the course (lower, upper, or graduate).

This course is a lower level course as it will strictly be an overview of personal asset management that will provide greater breadth than depth.

16. Outline (The course outline should be topical by weeks and should be sufficient in detail to allow for judgment of the content of the course.)

Financial Planning Process – Week 1

Financial Statements and Budgeting – Week 2

Tax Issues – Week 3

Asset Management (Basic) – Week 4

Credit Management – Week 5

Insurance (Life) – Week 6

Insurance (Other) – Week 7

Investments (equity) – Week 8

Investments (debt) – Week 9

Investments (other) – Week 10

Retirement Planning – Week 11

Estate Issues – Week 12

Financial Distress – Week 13

17. Course requirements (e.g. research papers, projects, interviews, tests, etc.)

Exams, research paper, Excel modeling

18. Special features (e.g. labs, exhibits, site visitations, etc.)

N/A

19. Department staffing and classroom/lab resources (Will this require additional faculty, supplies, etc.?)

NO

20. What is the primary intended learning goal for students enrolled in this course?

The primary intended learning goal for students to achieve when they complete this course is to have the ability and knowledge to understand the concepts, issues, and solutions to problems that arise in the personal asset management areas..

21. Reading and writing requirements:

a. Name of book, author, edition, company and year

Personal Financial Planning, by Gitman, Joehnk, and Bilingsley. 13th edition and published by South-Western Cengage

b. Number of pages of reading required per week: 20-25

c. Number of pages of writing required over the course of the semester: 20-25

22. High-Impact Activities (Check all that apply)

Collaborative assignments

Research with a faculty member

Diversity/Global learning experience

Service learning or community learning

Study abroad

Internship

Capstone or senior culminating experience

Other Explain: Enter text...

23. Considering the indicated primary goal (in Box #20), provide up to three outcomes that you expect of students after completion of this course.

**Outcome #1:** (For example, what will students who meet this goal know or be able to do as a result of this course?)

Students will be able to determine which investment vehicle(s) are right for different individuals based on goals and constraints..

Learning Activity:(For example, what instructional processes do you plan to use to help students reach this outcome?)

Lecture and case studies to examine the issues posed

Assessment Tool: (For example, what will students demonstrate, represent, or produce to provide evidence of their learning?)

Students on the exam will be able to provide accurate investment decisions based on different scenarios posed on the exam.

*(Repeat if needed for additional outcomes 2 and 3)*

**Outcome #2:**

Students will be able to determine the costs and benefits of different personal asset groups and sub-groups.

Learning Activity:

Lectures will analyze the different assets that are available to individuals and their relative benefits.

Assessment Tool:

Students on the exams will be able to determine which assets should be chosen and why with the limited financial resources available to the “proposed client”

**Outcome #3**:

Students will be able to determine current laws and proposed laws that will affect their or their client’s personal assets.

Learning Activity:

Develop a written research paper to argue for a specific side in an on-going debate that effects personal asset choice.

Assessment Tool:

The students will present their papers and engage in a debate to argue their side of the on-going debate

24. Please indicate the extent to which this course addresses university-level student learning outcomes:

* 1. Global Awareness

Minimally  
Indirectly  
Directly

* 1. Thinking Critically

Minimally  
Indirectly  
Directly

* 1. Using Technology

Minimally  
Indirectly  
Directly

**From the most current electronic version of the bulletin, copy all bulletin pages that this proposal affects and paste it to the end of this proposal.**

**To copy from the bulletin:**

1. Minimize this form.
2. Go to <http://registrar.astate.edu/bulletin.htm> and choose either undergraduate or graduate.
3. This will take you to a list of the bulletins by year, please open the most current bulletin.
4. Find the page(s) you wish to copy, click on the “select” button and highlight the pages you want to copy.
5. Right-click on the highlighted area.
6. Click on “copy”.
7. Minimize the bulletin and maximize this page.
8. Right-click immediately below this area and choose “paste”.
9. For additions to the bulletin, please change font color and make the font size larger than the surrounding text. Make it noticeable.
10. For deletions, strike through the text, change the font color, and enlarge the font size. Make it noticeable.

Finance (FIN)

FIN 2013

Personal Asset Management – The use of financial assets as vehicles for saving for the future, investments in combinations of assets to meet financial objectives, and how the financial objectives will change over the life span of the investor. Fall, Spring

FIN 3713.

Business Finance

Legal forms of American business organization, policies, meth

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ods, and institutions involved in financing business. The principles of financial management will

be studied with emphasis on the corporation, including cash flows, securities, financial structures,

expansion, and acquisitions. Prerequisite, ACCT 2133 or 2023. Fall, Spring, Summer.

FIN 3733.

Personal Finance

Concerned with management of the personal financial resources

of the individual and the family. Provides guidance for consumer purchasing and credit, personal

insurance, taxation, investing, estate planning, and social security. Designed for non-business

majors, course counts only as a free elective, except where required in major

. Demand.

FIN 3763.

Financial Institutions and Markets

An in depth study of financial institutions such

as banks, savings and loans, insurance companies and financial markets. Primary emphasis will

be on depository institutions. Prerequisite, FIN 3713. Fall, Spring.

FIN 3773.

Financial Risk Management

An in depth study of financial risks facing banks, such

risks as those arising from fixed income and foreign exchange investments will be covered. Fall.

FIN 3813.

International Financial Management and Banking

Study of financial concepts

and issues in banking as they relate to business decisions in a global economy

. Demand.

FIN 4293.

New Venture Financing

Introduction to the dynamic challenges facing new busi

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ness ventures in securing financial backing to support growth and development. Venture capital,

internally generated funding and external sources of funding will be discussed along with debt and

equity financing. Demand.

FIN 4723.

Investments

Security investment, the tools of investment analysis, the formulation

of investment policy and the role of the individual investor in the economy. Prerequisite, FIN 3713.

Fall, Spring.

FIN 4743.

Managerial Finance

Emphasis on principles and tools for analysis and decision

making in working capital management. Studies include cash flow forecasting, inventory model

applications, sources and uses of funds analysis, trade credit policies, and techniques of short and

intermediate term sales forecasting. Prerequisite, FIN 3713. Spring.

FIN 4753.

Capital

Management

Analysis of the management aspects relating to the inflows

and outflows of permanent capital in business enterprises. Examines the management of long-term

assets, long-term credit, equity and internal financing. Corporate expansion including mergers,

acquisitions, corporate reorganization, and bankruptcies. Prerequisite: FIN 3713. Fall, Spring.

FIN 4763.

Bank Management

Principles used in the management of commercial banks, relat

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ing to loans, credit analysis, security portfolios, analysis and interpretations of Federal Reserve

regulations and publications. Prerequisite, FIN 3713. Fall.

FIN 4773.

Advanced Bank Management

Applications of financial management techniques to

ban management decisions through experiential learning opportunities. Computer based analysis,

simulations, and written and oral presentations. Prerequisite, FIN 4763. Spring