

Business Administration

BUAD 234

RETIREMENT INCOME PLANNING

3

Learners examine the issues related to retirement planning. Topics include options in financing retirement, retirement needs analysis, products, issues and practices in the area of retirement. Professional and ethical responsibilities of financial planners are explored.

Winter 2020

BUAD 251, MATH 114

No

No

Yes

3

Elective Financial Services option

Students with credit for BUAD 252 or BUAD 254 cannot take BUAD 234 for further credit.

This course is recognized by Advocis as satisfying one element of the educational requirements which must be met in order to write the FPE1 exam, the first of two required to obtain licensing as a CFP.

Professors

Steve Watson	Cell: 250-718-3022	Kelowna: C103
--------------	--------------------	---------------

Course Schedule

		Monday, January 6 First Day of Classes Monday, February 17 Family Day Tuesday, February 18 Friday, February 21 Reading Break Thursday, April 9 Last Day of Regular Classes	
2020 Week of			
Jan	6	Introduction / CFP Pathway Financial Services Industry	Handout / Website resources
	13	FP Canada Code of Ethics FP Process / Retirement Needs Analysis	Handout
	20	Retirement Needs Analysis - Applications Consumer Protection	Handout

