



BAKER COLLEGE

STUDENT LEARNING OUTCOMES

FIN 4010 Personal Financial Planning
3 Semester Hours

Student Learning Outcomes and Enabling Objectives

1. Assess the current financial situation of a client.
 - a. Determine the client's assets and valuations.
 - b. Determine the client's debt situation.
 - c. Determine the client's current net worth.
 - d. Determine the client's risk management techniques in place.
 - e. Determine the client's goals, risk tolerance and time horizon.
 2. Construct a personal financial plan for a client.
 - a. Interpret financial markets and economic issues as they impact, risk, pricing and return on investment possibilities.
 - b. Apply information and financial data from various sources to selecting appropriate investment, risk management, retirement, and estate planning issues.
 - c. Prioritize financial decisions for clients to help them meet their financial planning goals.
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These SLOs are approved for experiential credit.

Effective: Fall 2017