

Program - Personal Financial Planning Track (BS, BA) - Mapping: Curriculum Mapping

Legend: (1) Introduced, (2) Reinforced, (3) Mastered, (4) Assessed

Learning Outcomes	FIN 351	FIN 385	FIN 354	ACC 317	FIN 386	FIN 389
SLO 1 Demonstrate Understanding - Demonstrate a comprehensive understanding of the content found within the Financial Planning curriculum and effectively apply and integrate this information in the formulation of a financial plan.	1					3, 4
SLO 2 Communicate - Effectively communicate the financial plan, both orally and in writing, including information based on research, peer, colleague or simulated client interaction and/or results emanating from synthesis of material.	1					3, 4
SLO 3 Collect - Collect all necessary and relevant qualitative and quantitative information required to develop a financial plan.	1	2	2	2	2	3, 4
SLO 4 Analyze and Evaluate - Analyze personal financial situations, evaluating clients' objectives, needs, and values to develop an appropriate strategy within the financial plan.	1	2	2	2	2	3, 4
SLO 5 Logic and Reasoning - Demonstrate logic and reasoning to identify the strengths and weaknesses of various approaches to a specific problem.	1	2	2	2	2	3, 4
SLO 6 Evaluate - Evaluate the impact of economic, political, and regulatory issues with regard to the financial plan.	1	2	2	2	2	3, 4
SLO 7 Apply - Apply the CFP Board Financial Planning Practice Standards to the financial planning process.	1					3, 4
SLO 8 Analyze and Recommend - Analyze a client's degree of risk and loss aversion and insure recommendations are consistent with a client's risk propensity, attitudes, capacity, knowledge, and needs.	1	2	2	2	2	3, 4