

Brief Course Outline

Course Title: **Personal Financial Planning**

Course Number and Section

MOS

2277A 550

Instructor Name(s): Barry Hawn

Instructor Email(s): bhawn@uwo.ca

Disclaimer: Information in the brief course outline is subject to change. The syllabus posted on OWL Brightspace is the official and authoritative source of information for the course.

Course Description:

This course is designed to give students the tools necessary to manage their own finances over their lifetime. It would be of interest to anyone who plans to have a job, buy a car, buy a house, have a family, and retire to a comfortable life.

Learning Outcomes: one outcome per entry

1. Goal Setting
2. Understanding the importance of the time value of money
3. Budgeting
4. Savings & emergency funds
5. The basics of personal income tax
6. RRSPs & TFSAs
7. Buying/Owning a home
8. Mortgages
9. Buying/Owning rental property
10. Understanding banking and how to use it as a tool
11. Debt & credit – the good, the bad & the ugly
12. Owning a car
13. Home & auto insurance
14. Life & health insurance
15. Investing fundamentals
16. Stocks, bonds, mutual funds & ETFs

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| 17. Active vs. passive investing |
| 18. Asset classes and historical performance |
| 19. Safe Portfolio Decumulation |

Textbooks and Course Materials:

Madura, Jeff; Gill, Hardeep Singh, Personal Finance, 6th Canadian Edition, Pearson ISBN 9780138254834. The textbook costs \$72.

Methods of Evaluation: one assignment per entry

Assignment	Due Date mm/dd/yy	Weight - %
Success Assignment	10/02/2026	8
Budget Assignment	11/06/2026	12
Midterm Exam	10/30/2026	40
Final Exam	12/15/2026	40

Sunday, August 9, 2026

Huron Brief Course Outline 2026/27

In-course Costs \$072.00

For Textbooks and Course Materials (below), you are required to include the cost of each textbook or other learning material.

Note whether there are any restrictions that would prevent a student from using a second-hand copy. Here is some suggested text:

- Required textbook: [author, title, edition, publisher, date]. Cost: [insert amount].
 - Or include the weblink of the textbook’s publisher site that includes the cost information.
- Students need to purchase this edition. Second-hand or older editions will not be sufficient.
- OR Students are welcome to purchase second-hand or earlier editions of this textbook.
- This course has an optional field trip that costs [insert amount].
- This course has a required field component that costs [insert amount].

In solidarity with the Anishinaabe, Haudenosaunee, Lūnaapéewak, and Chonnonton peoples on whose traditional treaty and unceded territories this course is shared.