Huron AT WESTERN

Brief Course Outline

Course Title:	**Personal Financial Planning**
Course Number and Section:	MOS 2277A 551
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 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:

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

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 9780138201319.

Methods Of Evaluation:

Assignment	Due Date mm/dd/yy	Weight - %
Success Assignment	09/27/2024	8
Budget Assignment	11/15/2024	12
Midterm Exam	10/25/2024	40
Final Exam		40

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

Friday, August 16, 2024