

## 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 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 9780138254834. The textbook costs \$68.

Students are able to purchase an earlier version of the textbook, however all exam questions will come from the edition listed above. Therefore, if you use an earlier version you may not be adequately prepared the exams.

[https://bookstore.uwo.ca/textbook-search?campus=HC&term=W2025A&courses%5B0%5D=550\\_HC/MOS2277A](https://bookstore.uwo.ca/textbook-search?campus=HC&term=W2025A&courses%5B0%5D=550_HC/MOS2277A)

**Methods Of Evaluation:**

| Assignment         | Due Date mm/dd/yy | Weight - % |
|--------------------|-------------------|------------|
| Success Assignment | 09/26/2025        | 8          |
| Budget Assignment  | 10/31/2025        | 12         |
| Midterm Exam       | 10/24/2025        | 40         |

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

Wednesday, August 6, 2025