Huron AT WESTERN

Brief Course Outline

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

The objective of this course is to provide students with the financial literacy skills necessary to manage personal financial issues over their lifetime. Students will develop skills needed to assist themselves, and others, in managing personal financial issues such as budgeting, management of personal debt and savings, investing, insurance products and estate planning.

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	01/24/2025	8
Budget Assignment	03/14/2025	12
Midterm Exam	02/28/2025	40
Final Exam	04/30/2025	40

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

Thursday, November 28, 2024