Department of Personal Financial Planning
Elective Courses for Undergraduates - Spring 2012

I know most of you are focused on final exams right now, but when you start thinking about spring enrollment again, I hope the following will guide you as you select courses. If you have any specific questions about the courses, please email the professor listed as teacher-of-record for the class.

> NOTE—PFP 3376 (Asset Management I) is being offered from 11:00-12:20 TR this spring. We normally teach this class only in the fall, but in 2012 the course will be taught both spring and fall semesters. I strongly recommend you take the class this spring if you have the prerequisites and it fits into your schedule so that you can benefit from a lower student-teacher ratio. (Dr. Akay)

PFP 3210 – Professional Field Experience - Supervised attendance and participation in professional conferences and seminars focusing on professional issues. Grades are on a pass/fail basis.

- Section 001 – TD Ameritrade/Orlando, Florida/February 1-4. (Dr. Salter)
  The TD Ameritrade conference offers educational sessions and networking opportunities for RIA firms using TD Ameritrade as their custodian. Section 001 generally has competitive enrollment for only 10-15 students. Applications for section 001 will be available as soon as conference details are determined.

- Section 002 – Technology Tools for Today Conference/Dallas, Texas/February 16-18. (Dr. Katz)
  Learn about the latest technology related to financial planning services. This is a great conference for those of you who want to work with technology and who are interested in business practices.

- Section 003—NAPFA National Conference/Chicago, Illinois/May 14-19. (Dr. Hampton)
  This is the largest conference of fee-only financial advisors. If offers educational sessions and networking opportunities. Since this conference happens after the spring semester, students receive an incomplete until we return from the trip at which time a grade change is completed.

- Section 004—Young Advisors Symposium (YAS)/Phoenix, Arizona, January 21-23. (Dr. Gilliam)
  YAS brings together young advisors and students entering the financial services profession with the profession's leaders including Michael Kitces and Brian Kush. YAS is an educational and networking event with a clear career focus.
  - Learn from industry leaders about real issues affecting financial service professionals
  - Take home practical suggestions as you begin and grow your career
  - Learn how building your personal brand enhances career success
  - Tour the Edward Jones Phoenix Training facility

Notes: Special course fee pays for conference registration and hotel accommodations (typically 3 per room) and for two TTU PFP shirts.* ***Fee does <u>not</u> pay for transportation costs or meals not provided by the conference.* *Class will meet approximately 2-3 times before and after the conference for 1 ½ hour per meeting (days and times TBA). Some conferences also include visits to financial planning practices in the area so do not make travel arrangements before learning from your instructor exactly when you need to arrive and when you are free to leave. If you have questions about the course, contact the instructor of record for the particular section you are interested in.*

PFP 3301 – Personal and Family Finance - Introduction to personal financial planning, including goal setting, cash management, credit, insurance, taxes, housing, investment alternatives, and retirement plans.

- Section 001-004 and section D01. Survey course in personal finance. Section D01 is an on-line course taught completely via BlackBoard.

**Notes: Only PFP majors in their first two semester of their PFP coursework may take this course as elective. Provides an overview of topics covered in the PFP degree program. Consent required. See Dr. Salter.*

PFP 4175 – Special Topics in Personal Financial Planning - Study of special topics in personal financial planning taught by experts in their respective areas.

- Section 001 – Ben Baldwin, (Title and dates coming soon). Book Required. Prereq: PFP 2315 (Dr. Salter)

- Section 002 –Tom Robinson, "Asset Allocation – What Have You Done for Me Lately", March 23 (one day only with considerable reading required prior to class. Book Required. Prereq: PFP 3376. (Dr. Salter)

**Notes: Class generally meets 9am to 5pm on Friday and 9am to 4pm on Saturday. The purchase of a book may be required and should be read before the course meets. Books will be available at the bookstore or through an online bookseller. Course can be repeated for as elective hours as topics change.*

- Section D01 – Financial Happiness: Satisfaction in Spending and Saving. (Dr. James)

**Notes: This is a distance class taught through BlackBoard. Both PFP majors and non-majors can take this section.*

PFP 4377 – Practicum - Supervised hands-on experience designed to prepare the student for a career in financial planning/counseling. Space is limited depending upon the opportunities available in a particular semester.

- Section 001 – Financial Planning. (Dr. Katz)
- Section S02 – Financial Counseling /Pro Bono. (Dr. Durband)
- Section 003—Financial Literacy—teaching the Money Matters: Make it Count program at Boys and Girl Clubs in the area. (Dr. Katz)

**Notes: Consent of Instructor required. See professor for details and permissions. Prerequisites apply.*

If you are in your last semester and have above a 3.0 GPA, you are also able to take the following graduate-level course!

PFP 5326—Advanced Charitable Planning - Review of sophisticated charitable planning techniques with a special emphasis on creative uses of private foundations, donor advised funds, charitable remainder trusts, and advanced charitable estate planning techniques.

- Section D01—an on-line course taught via BlackBoard. (Dr. James)

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