

# Assessment: Assessment Plan

## Degree Program - HS - Personal Financial Planning (MS)

**CIP Code:** 19.0401.00

**Degree Program Coordinator:** John Gilliam

**Degree Program Coordinator Email:** christopher.m.browning@ttu.edu, john.gilliam@ttu.edu

**Degree Program Coordinator Phone:** +18068348060

**Degree Program Coordinator Mail Stop:** 1210

**Program Purpose Statement:** The purpose of the M.S. in Personal Financial Planning (PFP) is to educate students to the highest standards of excellence and to foster intellectual, ethical, and personal development. The degree program will prepare students to be professionals who are highly competent, articulate, ethical, principled, innovative, and confident in financial planning.

**Modality:** Fully Online (86-99% Online), Face-to-Face

### Student Learning Outcome: Technological Skills

Students will demonstrate the technological skills needed to function at a high level in the financial planning profession.

**Outcome Status:** Active

**Outcome Type:** Student Learning

**Start Date:** 07/01/2006

#### Assessment Methods

##### Course Level Assessment - Performance on Retirement Funding Project (Active)

**Criterion:** DIRECT ASSESSMENT/EMBEDDED ASSESSMENT: There is a required project over retirement funding using industry specific software embedded in the retirement class (PFP 5394). 80% of students will earn a satisfactory or better rating on their effective use of technology on this project. A grade of "B" equates to satisfactory performance related to this student learning outcome.

##### Course Level Assessment - Performance on the Comprehensive Technology Project (Active)

**Criterion:** DIRECT ASSESSMENT/EMBEDDED ASSESSMENT: There is a required comprehensive technology course embedded in the Technology course (PFP 4380). 80% of students will earn a satisfactory or better rating on their overall performance on this project. A grade of "B" equates to satisfactory performance related to this student learning outcome.

### Student Learning Outcome: Overall Program Assessment

The program will prepare students to be professionals who are highly competent in financial planning.

**Outcome Status:** Active

**Outcome Type:** Program

**Start Date:** 07/01/2006

#### Assessment Methods

##### Course Level Assessment - Comprehensive Financial Plan (Active)

**Criterion:** DIRECT ASSESSMENT/EMBEDDED ASSESSMENT: There is a required assignment embedded in the Capstone course. 90% of students will earn a satisfactory or better rating on their overall performance on the comprehensive capstone case. A "B" on the grading rubric equates to satisfactory performance related to this student learning outcome.

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## Discipline-Specific Certification/Licensure - CFP(r) Exam Pass Rate (Active)

**Criterion:** The TTU pass rate on the CFP (r) Exam will exceed the national pass rate on a cumulative basis.

## Employment - Graduate Employment (Active)

**Criterion:** 85% of graduates will be employed in positions related to their degree.

## Student Learning Outcome: Oral Communication Skills

Students will demonstrate the oral communication skills needed to communicate successfully with clients, build relationships, and advise clients on how to meet their financial goals.

**Outcome Status:** Active

**Outcome Type:** Student Learning

**Start Date:** 07/01/2006

### Assessment Methods

#### Course Level Assessment - Mock Counseling and Communication Project (Active)

**Criterion:** DIRECT ASSESSMENT/EMBEDDED ASSESSMENT: There is a required oral presentation assignment embedded in the Client Communication and Counseling course (PFP 5377). 80% of students will earn a satisfactory or better rating on the oral presentation portion of this project. A "B" on the grading rubric equates to satisfactory performance related to this student learning outcome.

#### Capstone Assignment/Project - Capstone Plan Presentation (Active)

**Criterion:** DIRECT ASSESSMENT/EMBEDDED ASSESSMENT: There is a required oral presentation assignment embedded in the Capstone course. 80% of students will earn a satisfactory or better rating on the oral presentation of their capstone case. A "B" on the grading rubric equates to satisfactory performance related to this student learning outcome.

## Student Learning Outcome: Written Communication Skills

Students will demonstrate the written communication skills required to function as a successful professional in the financial planning profession.

**Outcome Status:** Active

**Outcome Type:** Student Learning

**Start Date:** 07/01/2006

### Assessment Methods

#### Course Level Assessment - PFP 5377 Writing Assignment (Active)

**Criterion:** DIRECT ASSESSMENT/EMBEDDED ASSESSMENT: There is a required writing assignment embedded in the client counseling and communication course (PFP 5377). 80% of students will earn a satisfactory or better rating on their written communication skills on this project. A "B" on the grading rubric equates to satisfactory performance related to this student learning outcome.

#### Course Level Assessment - PFP 5371 Writing Assignment (Active)

**Criterion:** DIRECT ASSESSMENT/EMBEDDED ASSESSMENT: There is a required writing assignment embedded in the Fundamentals of Personal Financial Planning course. For this assignment 80% of students will earn a satisfactory or better rating on their written communication skills. A "B" on the grading rubric equates to satisfactory performance related to this student learning outcome.

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## Student Learning Outcome: Financial Planning Knowledge

Students will demonstrate the financial planning knowledge needed to become competent and ethical financial planning professionals.

**Outcome Status:** Active

**Outcome Type:** Student Learning

**Start Date:** 07/01/2006

### *Assessment Methods*

**Capstone Assignment/Project** - Grade on the Technical Component of the Capstone Plan (Active)

**Criterion:** DIRECT ASSESSMENT/EMBEDDED ASSESSMENT: There is a required assignment embedded in the Capstone course (PFP 5373). 80% of students will earn a satisfactory or better rating on the technical accuracy of the content included in their comprehensive capstone case. A "B" on the grading rubric equates to satisfactory performance related to this student learning outcome.

**Discipline-Specific Certification/Licensure** - CFP(r) Exam Pass Rate (Active)

**Criterion:** TTU pass rate on the CFP (r) Exam will exceed the national pass rate on a cumulative basis.