

Bachelor of Science Finance/Financial Planning Track- NewTrk and Program Name Change-2018-09-19

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Form Information

 The page you originally access is the global template version. To access the template document that progresses through the workflow, please complete the following steps:

First Step: ONLY change the text in the [brackets] so it looks like this: **CRIM 101 Intro to Criminology-CrsRvs-2015-08-10**

- If DUAL LISTED list BOTH courses in the page title***

Second Step: Click “SAVE” on bottom right

- DO NOT TYPE ANYTHING INTO THE FIRST PAGE OTHER THAN THE TEXT IN BRACKETS***
- Please be sure to remove the Brackets while renaming the page***

Third Step: Make sure the word ***DRAFT*** is in yellow at the top of the proposal

Fourth Step: Click on “**EDIT CONTENTS**” (*not EDIT*) and start completing the template. When exiting or when done, click “**SAVE**” (*not Save Draft*) on bottom right

When ready to submit click on the workflow icon and hit approve. It will then move to the chair as the next step in the workflow.

**Indicates a required field*

Proposer*	Dr. Robert Boldin	Proposer Email*	rboldin@iup.edu
Contact Person*	Dr. Alan Eastman	Contact Email*	aeastman@iup.edu
Proposing Department/Unit*	Department of Finance and Legal Studies	Contact Phone*	724-357-5738

(A) Track Title: *	Financial Planning Track
(B) Degree Designation: *	Bachelor of Science
(C) Program Name: *	Finance
(D) List number of credits: *	120
(E) Course Level: *	undergraduate-level
(F) Narrative Catalog Description: *	The financial planning track provides students with specialized training in the rapidly expanding field of wealth management. Coursework in the financial planning track will help prepare students interested in attaining the Certified Financial Planner designation. See attachment for all changes.
(G) List of Program Requirements in catalog layout including course numbers, titles, credits and any footnotes. *	Program Requirements (Financial Planning Track).docx

<p>(H) Student Learning Outcomes*</p> <p><i>NOTE: the proposed track MUST have</i></p> <p><i>at least one outcome that is unique to THIS track</i></p> <ul style="list-style-type: none"> • Outcomes must be measurable • Tracks, concentrations, certificates must have at least one outcome that is unique from a related degree program • SLOs will be evaluated as part of the program's assessment plan 	<p>Student Learning Outcomes and Assessments.docx</p>
<p>Rationale for Proposal</p>	
<p>(I) Why is this track being proposed?*</p>	<p>The field of financial planning is growing rapidly and this growth is expected to continue for many years. Professional financial planners are increasingly acquiring the Certified Financial Planner designation. The financial planning track will help prepare students seeking careers in financial planning by emphasizing the topics necessary for obtaining the Certified Financial Planner designation. Additionally, the current finance program is being renamed the Corporate Finance Track to distinguish it from the newly proposed Financial Planning Track. Also, the number of hours for Liberal Studies is incorrect in the current catalog, showing 46 - 48. The total of Liberal Studies and Free Electives should be 60 hours. Therefore, with Free Elective hours at 12 - 13, the total for Liberal Studies should be 47 - 48.</p>
<p>(J) What role, if any, does it serve the College /University above and beyond the role it serves in the department?*</p>	

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