
COURSE DESCRIPTIONS

1

Program Name and Number BUSINESS ADMINISTRATION – FINANCIAL PLANNING (2007-2008)
1033

ACCT1030 Introductory Financial Accounting I

This course introduces accounting terminology, the accounting equation, the double-entry system of bookkeeping, the accrual basis of accounting, financial statements and the ledgers and journals making up a basic accounting system.

ACCT2260 Introductory Accounting for Financial Planning

This course is designed to provide introductory information on principles and methods used in accounting for current assets, long-term liabilities and equity accounts for both partnership and corporate business structures.

ACCT2270 Accounting for Financial Planning

This course covers accounting topics related to Financial Planning which were introduced in the introductory course. In addition to a more in-depth and theoretical treatment of these topics, the course also covers accounting for income taxes, pensions, leases, and the Statement of Changes in Financial Position.

BUS1020 Organizational Behaviour

This course is a study of what people think, feel and do in and around organizations. The course examines the behaviour of individuals working alone or in teams as the thought processes and structural contexts surrounding these actions. In conjunction with actual work place examples, it examines how factors which influence individual and team behaviour ultimately affect organizational effectiveness.

BUS2010 Business Law

This course is an introduction to the legal system which governs personal and commercial relationships in Canada. As such, it will provide the student with knowledge of the basic legal concepts, in order to gain insight into judicial reasoning, and develop the skills necessary for legal inquiry and analysis. Areas covered include: contract law, tort law, sales of goods and consumer protection, agency, partnership and corporate law, employment regulations, real property and protection of creativity.

BUS2030 Applied Ethics

This practical course challenges the student to evaluate how to make sound ethical decisions and to apply the process to today's workplace. This discussion course involves two compulsory presentations, one being a part of a team.

Some topical areas will cover the following: an ethical climate, corporate responsibilities, employer/employee rights and responsibilities, global ethics and emerging ethical issues.

BUS3030 Insurance Fundamentals

This course focuses on the insurance industry in Canada with emphasis on insurance products pricing, distribution, and personal risk management. Government social programs, pension, disability insurance, group insurance, and applications for insurance programs in the small business market will also be covered.

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COMM1140 Interpersonal Communications Skills

In today's business world, effective interpersonal and communication skills are essential. This course will help students assess their personal abilities and styles of interacting with others, and their own communication skills. Then, through the application of theory and models, they will learn to leverage their identified strengths and improve on their areas of weakness. The course topics will cover areas including establishing personal and organizational goals, developing networking skills, improving team building and process skills, managing conflict, presenting effectively in a group, and running effective meetings. This course will focus on developing the "soft" managing skills to maximize career potential.

COMM1490 Professional Report Writing and Presentation Skills

This level two course is designed to enable students to reinforce and enhance the skills acquired in Introduction to Professional Writing and Presentation Skills by applying them to longer, more advanced projects. It also helps students to develop skills in research, informal and formal report writing, and professional oral presentation.

COMM1500 Introduction to Professional Writing and Presentation Skills

This course is designed to introduce the communication skills necessary for academic and professional success. By analysing cases that reflect real life communication situations, students will attain the skills in problem solving and decision making required in professional communications. Emphasis will be placed on producing effective letters and memoranda. The course also helps students to develop basic oral presentation skills.

COMP1003 Business Computing Applications II

During this course the student will learn and apply more advanced features of spreadsheet, word processing, and database applications to develop comprehensive solutions to business problems.

COMP1056 Business Computing Applications I

During this course, the student will learn to effectively use the Windows operating system, apply word processing techniques, create basic business presentations, and exploit the power of spreadsheets. Students will also learn the skills necessary to operate effectively within the Conestoga College computing environment. An emphasis will be placed on the development of solutions to business problems using commonly available microcomputer tools.

ECON1020 Microeconomics

In this course the student will become familiar with selected principles of economics within the context of Microeconomics. After an introduction to the discipline of economics, the course examines, in detail, the theory of consumer behaviour, and of specific market demand and supply. The course further examines the structures of cost and revenue, and the individual firm's behaviour in specified market environments.

ECON1030 Macroeconomics

In this course the student will become familiar with selected principles of economics within the context of Macroeconomics. After an introduction to the discipline of economics, the course examines, in detail, the models and mechanics of the macroeconomy, the measurements of economic activity, and the forecasted effects of fiscal and monetary policies on the basic economic indicators. As time permits, selected macroeconomic issues of current interest will be examined.

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FIN1020 Introductory Financial Planning

This course is an introduction to the areas of financial planning and financial services. Topics covered include the money markets, financial markets, investment portfolios and securities regulations.

FIN2010 Introduction to Financial Services Industry

This course relies heavily on guest speakers so that the student receives current information on the products/services offered by financial planning and brokerage firms, banks and trust companies, mutual funds and insurance companies.

FIN2020 Finance I

This is an introductory course in managerial finance. Its purpose is to introduce the student to the theory and principles of managerial finance.

FIN2030 Finance II

The corporate financial manager's role in the firm as it relates to long term issues in investing and financing is examined. Specific study is given to the theory and practice of capital budgeting, capital structure, dividend policy, cost of capital, valuations, mergers and acquisitions.

FIN2050 Canadian Securities I

This course is the first component of the Canadian Securities Course, accredited by the Canadian Securities Institute as the requisite course for selling securities in all provinces in Canada. Topics covered include: capital markets and financial services; the Canadian economy and its impact on financial markets; financing, listing and regulation of corporations issuing securities in the market; analyzing financial statements; the fixed income securities market; the equities markets. Course participants will write the first CSI industry exam as part of this course.

There is a mandatory additional charge to register with the Canadian Securities Institute which covers the cost of both the CSC 1 & CSC 2 course.

FIN2060 Canadian Securities II

This course is the second and final component of the Canadian Securities Course. Topics covered include: managed funds including mutual funds and other products; segregated funds; derivative securities; analyzing markets and products including fundamental valuation models, indices & averages; financial planning, ethics and taxation; asset allocation and portfolio performance. Course participants will write the second CSI industry exam as part of this course.

Successful completion of the course, including passing the CSI industry exams, ensures that an individual has met all the academic requirements to obtain a mutual fund license. An additional CSI course, the Conduct and Practices Handbook course, is required for a full brokerage license.

FIN2070 Advanced Financial Planning and Tax Applications

This course will permit students to apply the knowledge they have gained during previous courses in a computer-based environment.

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FIN3020 Tax for Financial Planners

The student is provided with a financial planner's working knowledge of the Income Tax Act. Topics covered include choice of investment through differential tax rates for business income, employment income, dividends and capital gains, retirement planning through RRSP's and pension plans, and estate planning through the tax free pass-through of insurance proceeds. The lab is designed to familiarize students with income tax legislation affecting the determination of net income for tax purposes for individuals, taxable income and federal income tax payable for individuals.

FIN3030 Professional Financial Planning (CSI)

This course covers financial planning issues, legal issues, tax planning, and ethics. Financial planning covers techniques of net worth and cash management, general provisions for mortgage loans, land title and repayment plans, role of insurance, retirement needs and estate planning and risk and return characteristics of investments. Legal issues covers issues related to contract law and contracts for property, liability and life insurance. The Canadian Securities Institute material is used in this course. There is a mandatory additional charge to register with the Canadian Securities Institute.

FIN3050 Advanced Financial Planning Applications

This course demonstrates the skills of selling and marketing related to the financial services industry, such as awareness of buyer behaviour, ability to organize an effective sales presentation, ability to develop and present an effective financial plan and comprehension of skills and attitudes essential to the successful salesperson. Course includes lab which provides experience with a variety of financial planning software applications.

FIN3060 Financial Policies and Processes

The course is designed to examine the accountant and his/her relationship to the entrepreneur. In addition the course will examine the management of the small business enterprise from the viewpoint of the accountant.

FIN3070 Integrated Financial Planning

Course Description

This course helps a student to enhance their ability to understand, meet, and exceed a client's financial needs while operating within the ethical framework demanded of the industry. It provides advanced training in asset allocation, pensions, the use of trusts and implementation and monitoring of a financial plan. The CSI Conduct and Practices Handbook course material is used for the ethics component of this course.

Students will write the industry exam for the CPH as part of this course. There is an additional fee for registration with CSI.

HRM2040 Human Resources Management

The primary focus of this introductory course is to offer the student an overview of the Human Resource (HR) Management function and each of its disciplines. The course emphasis is on the application of the skills and techniques commonly used today by HR professionals in each discipline area, and on understanding how they are related to the organization's overall strategy and objectives. Pertinent legislation is studied in detail. A section of the course is devoted to developing effective job search skills and to presenting oneself effectively in interviews.

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MATH1010 Business Mathematics I

The purpose of the course is to provide the student with a mathematical basis for personal and business financial decisions through four instructional modules. The course stresses business applications using arithmetic, algebra, ratio-proportion and graphing. Applications include payroll, cost-volume-profit analysis and merchandising mathematics. This course stresses logical reasoning and problem solving skills. A Texas Instrument BAI “Plus” calculator is required for the course.

MATH1020 Business Mathematics II

The purpose of the course is to provide the student with a mathematical basis for personal and business financial decisions. Topics include: simple interest, simple discount, compound interest, annuities and their many applications including amortization, sinking funds, Canadian mortgages and refinancing of loans. A Texas Instrument BAI “Plus” financial calculator is required.

MATH2250 Statistics

This is an introductory course in Business Statistics. The course covers simple descriptive statistics, probability and the binomial and normal probability distributions, statistical inference, introduction to sampling distributions, simple regression and correlation analysis.

MKT1040 Introductory Marketing I

This course introduces the student to the basic theories and concepts in marketing as well as an understanding of how these concepts are applied in the management of a company in both domestic and global markets.

MKT2130 Introductory Selling

Introductory selling will introduce the student to the integral part that selling plays in a wide variety of business environments, and will explain the importance of professional salesmanship in a buyer/seller relationship. Students will be presented with a wide variety of selling situations and will have the opportunity to learn and apply the theories of selling. This course is also designed to develop and refine the student’s presentation skills.

MKT2150 Marketing

This course applies the concepts developed in Introductory Marketing I to the specific objectives and strategies of product development, pricing, distribution and promotion.

OPER1160 Introduction to Operations Management

Operations management in an organization is more than simply scheduling parts through a production line. In this course, students will learn how the concepts in this discipline relate to such organizations as management consulting firms, financial institutions, marketing firms, airlines, hospitals, and manufacturing. The tools and tasks of Operations Management will be learned from the perspectives of manufacturing and service industries.

Date 2005-01-31

Previous Description Dated