Success Is Easier Than Failure

Bus 354: Financial Planning
David Schalow, PhD, CLU, ChFC, CFA, CFP, GRI, Former CRS
(715) 346-3160
dschalow@uwsp.edu

Description: BUS 354: Financial Planning. 3 cr. introductory survey course of the basic content included in the Certified Financial Planner (CFP) program. Financial Planning, Personal Insurance, Investments, Federal Income Tax, Retirement Planning, Employee Benefits, and Estate Planning will be covered. Prereq: 350 or cons instructor.

Text Book: Personal Financial Planning by Billingsley, Gitman, Joehnk, and (14th Edition)

Professor Background: Dr. Schalow has 30+ years of University teaching experience. He has written many academic articles on a wide variety of topics, including marketing, corporate finance, investments, real estate, and insurance. He has also authored a textbook, California Real Estate Principles, and Instructor's Manual. In addition he has professional experience in Real Estate, Insurance, Financial Planning, and Investments and many different types of Consulting. He has also owned several businesses in the fields of Real Estate, Mortgage Lending, Consulting, Training, and Online Marketing. In addition to the PhD in Business, he has the following Professional Credentials CLU (Chartered Life Underwriter), ChFC (Chartered Financial Consultant), CFA (Chartered Financial Analyst), CFP (Certified Financial Planner), CRS (Certified Residential Specialist, and a GRI (Graduate Real Estate Institute) Finally he has been licensed to sell, Financial Investments, All Lines of Insurance, and Real Estate in multiple states. (California, Nevada, Minnesota, and Wisconsin)

Contact Information: Office: CPS #434, dschalow@uwsp.edu, 715-346-3160
Office Hours: 11-2 pm MW, Other hours can be arranged by appointment. Professor's Blog, www.DaveSchalow.com (Tips on Success, Career Advice, Starting Businesses, Sales, Marketing, Stock and Real Estate Investing)

Grading

Three Exams Worth 90%
Project 10% **(Due Last Day of Class/Not at Final Exam) Physical Copy Only/No Digital**

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Semester Assignments

Week of:		
9/6	Ch 1	Intro
9/11	Ch 1, 2	Basics/Budgets
9/18	Ch 3	Taxes
9/25	Ch 4	Cash & Savings
10/2	Ch 5	Auto & Housing
10/9	1st Exam, Ch 6	Exam/Credit
10/16	Ch 6/7	Loans
10/23	Ch 8	Life Insurance
10/30	Ch 9	Health Insurance
11/6	Ch 10	Auto/HO Insurance
11/13	2nd Exam, Ch 11	Exam, Investment Planning
11/20	Ch 12	Stocks/Bonds
11/27	Ch 13	Mutual Funds
12/4	Ch 14	Retirement Planning
12/11	Ch 15	Estate Planning
12/18	Final Exam	7:15 – 9:15 pm (Monday)