Fall 2020 Course Descriptions as of 04/05/2020 08:13 PM

Information in Browse Course Catalog is subject to change. Information is term specific. Please refer to the appropriate term when searching for course content. Key to Course Descriptions may be found at: **http://rcs.registrar.arizona.edu/course_descriptions_key**.

Personal & Family Financial Pl (PFFP)

PFFP 196A: The MONEY Class: Financial Well-Being in College and Beyond (1 unit)
Description: This course is designed to introduce students to challenges and opportunities associated with managing money. The course will cover key personal finance topics and money management strategies relevant for college students in the early stages of their financial journey. This course will approach money topics from a personal point-of-view and students can expect to gain objective financial knowledge as well as insight into their own individual approaches to money. By the end of the semester, students will have a clear understanding of how they can set and achieve financial goals.
Grading basis: Regular Grades
Career: Undergraduate
Course Components: Seminar Required
Course typically offered:
Main Campus: Fall, Spring

Field trip: None

PFFP 310: Fundamentals of Personal and Family Financial Planning (3 units)
Description: This course is designed to introduce students to a broad overview of personal and family financial planning, with specific emphasis the financial planning process, financial strategies, savings and cash flow management, insurance, investments, taxes, use of credit, and time value of money.
Grading basis: Regular Grades
Career: Undergraduate
Course Components: Lecture Required
Course typically offered:
Main Campus: Fall, Spring

PFFP 311: Applied Family Investment Planning and Savings Strategies (3 units)
Description: This course is designed to familiarize students with the understanding and evaluation of investment options, plus the risks and rates of return of each type of investment. Study will also incorporate, among other topics, cash flow management, time value of money, measurement of investment returns, investment strategies, asset allocation and portfolio diversification, and alternative investments.
Grading basis: Regular Grades
Career: Undergraduate
Course Components: Lecture Required
Course typically offered:
Main Campus: Fall, Spring

PFFP 314: Risk Management and Insurance Planning (3 units)
Description: This course is designed to provide students with an introduction to the techniques and issues of risk management and insurance. While businesses will be included in the discussion, the emphasis of the course will be on personal risk management and insurance. Topics to be examined include life, disability, and health risks, social insurance, real and personal property liability risk, insurance companies and product markets, insurance pricing, insurance taxation, government regulation of insurance, legal principles in risk and insurance, types of insurance contracts and the contents thereof, and professional ethics and market conduct.
Grading basis: Regular Grades
Career: Undergraduate
Course Components: Lecture Required
Course typically offered:
Main Campus: Fall, Spring

PFFP 315: Applied personal and Family Income Tax Planning (3 units)
Description: This course is designed to introduce students to federal income taxation and the role of the tax code in financial planning for individuals, businesses, and business owners. Topics addressed include fundamentals of income tax planning, the measurement of taxable income, the taxation of business income, individual income taxation, and the tax compliance process.
Grading basis: Regular Grades
Career: Undergraduate
Course Components: Lecture Required
Course typically offered:
Main Campus: Fall, Spring

PFFP 402: Personal and Family Estate Planning (3 units)
Description: This course is designed to familiarize students with the principles and fundamentals of the estate planning process for individuals and families, as well as the various strategies and techniques available for generating a constructive estate plan. Course topics will include: gift, estate and generation-skipping transfer taxes coupled with planning techniques to minimize taxes on wealth transfers; strategies to transfer property, real and personal; non-tax characteristics of estate planning, including, probate, estate administration, and property ownership; and estate planning documentation.
Grading basis: Regular Grades
Career: Undergraduate
Course Components: Lecture Required
Course typically offered:
Main Campus: Fall, Spring

Recommendations and additional information: Successful completion of PFFP 310, PFFP 311, and PFFP 315.

PFFP 403: Retirement Savings and Income Planning (3 units)
Description: This course is designed to provide students with the knowledge of both public and private retirement plans, with an appreciation of the usefulness of employee benefits and the ability to counsel others on important retirement and employee benefit decisions. Discussion will include corporate pension and profit sharing plans, self-employed Keogh plans, IRAs, annuities, health insurance, and social security, as well as additional issues individuals face in retirement, including insurance, medical, and life-style and community choices.
Grading basis: Regular Grades
Career: Undergraduate
Course Components: Lecture Required
Course typically offered:
Main Campus: Fall, Spring

-SA represents a Student Abroad & Student Exchange offering
-CC represents a Correspondence Course offering
May Be Offered Departments may offer this component in some semesters. See the Schedule of Classes for term-specific offerings.

PFFP 406: Professional Conduct and Fiduciary Responsibility (3 units)
Description: This course is designed to introduce students to an overview of the ethical, legal, and fiduciary environment in financial planning and wealth management. It is based on the assumption that financial planning, like business and law, is a profession whose practitioners carry out an important role not only in the financial planning industry, but also in society in general. As individuals enter the profession, they take on a distinctive set of responsibilities that go with the role. The purpose of the course is to provide students a pragmatic understanding of professional conduct, ethics, and fiduciary responsibility, and to provide students an array of functional tools to meet the expected standards of the industry.
Grading basis: Regular Grades
Career: Undergraduate
Course Components: Lecture Required
Course typically offered:
Main Campus: Fall

Enrollment requirement: PFFP students only.

PFFP 491: Preceptorship (1 - 3 units)
Description: Specialized work on an individual basis, consisting of instruction and practice in actual service in a department, program, or discipline. Teaching formats may include seminars, in-depth studies, laboratory work and patient study.
Grading basis: Alternative Grading: S, P, F
Career: Undergraduate
Course Components: Independent Study Required
Repeatable: Course can be repeated a maximum of 2 times.
Course typically offered:
Main Campus: Fall, Spring

PFFP 493: Internship (1 - 12 units)
Description: Specialized work on an individual basis, consisting of training and practice in actual service in a technical, business, or government establishment.
Grading basis: Alternative Grading: S, P, F
Career: Undergraduate
Course Components: Independent Study Required
Repeatable: Course can be repeated a maximum of 12 times.
Course typically offered:
Main Campus: Fall, Spring

Student Engagement Activity: Professional Development
Student Engagement Competency: Professionalism

PFFP 495A: Personal and Family Financial Planning Program Internship Orientation (1 unit)
Description: Introduction and explanation of the standards, rules, and expectations of a practice and service internship in an established financial planning, wealth management, brokerage, banking, or insurance organization. And, to introduce students to the terms and conditions of the FINRA-sponsored Security Industry Essentials (SIE) exam, a new introductory level exam for prospective financial services industry professionals. Its purpose is to assess a candidate¿s basic knowledge of products, rules, structure, and foundation of the securities industry and regulatory agencies.
Grading basis: Alternative Grading: S, P, F
Career: Undergraduate
Course Components: Colloquium Required
Course typically offered:
Main Campus: Spring

PFFP 498: Capstone: Family and Personal Family Plan Development (3 units)
Description: This capstone course bridges academic coursework with actual practice management, introducing students to the skills and tools needed for developing a comprehensive financial plan for a client. The first part of the course provides a review of the financial planning CFP Board topics, including ethics and principles of communication and counseling. Classes also review/apply the process and techniques for preparing and presenting a financial plan in an environment of non-liability.
Grading basis: Regular Grades
Career: Undergraduate
Course Components: Lecture Required
Course typically offered:
Main Campus: Spring

Recommendations and additional information: Successful completion of PFFP310, PFFP311, PFFP 314, PFFP 315, PFFP402, and PFFP 403.

PFFP 498H: Honors Thesis (3 units)
Description: An honors thesis is required of all the students graduating with honors. Students ordinarily sign up for this course as a two-semester sequence. The first semester the student performs research under the supervision of a faculty member; the second semester the student writes an honors thesis.
Grading basis: Regular Grades
Career: Undergraduate
Course Components: Independent Study Required
Repeatable: Course can be repeated a maximum of 2 times.
Course typically offered:
Main Campus: Fall, Spring, Summer

Enrollment requirement: Student must be active in the Honors College.
Honors Course: Honors Course
Honors Course: Honors Course

PFFP 499: Independent Study (1 - 9 units)
Description: Qualified students working on an individual basis with professors who have agreed to supervise such work.
Grading basis: Alternative Grading: S, P, F
Career: Undergraduate
Course Components: Independent Study Required
Repeatable: Course can be repeated a maximum of 9 times.
Course typically offered:
Main Campus: Fall, Spring