York University
School of Administrative Studies
AP/ADMS 4506 Winter 2020 Course Outline

Professional Financial Planning

Mondays 7:00 p.m. – 10:00 p.m.

Classroom	HNE 030
Instructors	Dr. Jodi Letkiewicz & Dr. Chris Robinson
Office	204 Atkinson (Letkiewicz) & 258A Atkinson (Robinson)
Email	jodilet@yorku.ca / crobinso@yorku.ca
Office Hours	By appointment

Course Description

The course covers advanced topics in financial planning.

Prerequisites: 4505 or permission of the instructor

Required Readings

none

Evaluation Scheme

	Points
Cases (2)	30%
Literacy Project	25%
Final Project	35%
Communication	10%
Participation	5%
	100%

Cases

We will work through two cases in groups of no more than 3 people. The week the case is due we will discuss and debate any differences in class.

Financial Literacy Project

The Institute of Advanced Financial Planners (IAFP) hosts an annual student competition each year. This year the theme is "Unlocking Financial Literacy for the Next Generation." Students should organize themselves into teams of 2-3 and are responsible for creating 2 page presentation

outline and a 3 to 5 minute promotional video. Further details are available here: https://www.iafp.ca/student-comp

Final Project

Each student is to select one financial planning topic and teach the class. This should be accompanied by a research paper on the topic. The paper should be formatted using APA style and should not exceed 5,000 words. More information will be provided in class.

RELEVANT UNIVERSITY/LA&PS/SCHOOL REGULATIONS

The regulations on many aspects of coursework that apply to you are on: http://sas.laps.yorku.ca/students/. You are responsible for understanding and following these regulations.

Topical Coverage

Due dates and topics are subject to change.

Week	Topics	Readings	Assignments due
1: Jan 6	Introduction to course Case Study #1		
2: Jan 13	Case #1 presentation and discussion		Case 1
3: Jan 20	Financial Literacy Competition - Intro		
4. Jan 27	Communication Essentials + Case #2		
5: Feb 2	Communication Essentials + Case #2		Outline and annotated bibliography for final paper
6: Feb 10	Case #2 presentation and discussion		Case 2 Communication reflection
Reading Week – No classes (Feb. 15 – 21)			
7: Feb 24	Financial Literacy Project Workshop		
8: March 2	Present Financial Literacy Project		Financial literacy project
9: March 9	Draft of Final Paper and Peer Review		
10: March 16	No Class – Complete Paper and Presentation. Individual meetings with professors		
11: March 23	Class Presentations		Final paper due
12: March 30	Class Presentation		