BUSAD 3750 Retirement Savings & Income Planning

3 hours

Majors, Minors & Degrees:

Majors
Financial Planning (B.A., B.S)

Minors
Finance

Minors (Adult)
Finance

Departments/Programs:

Business, Accounting and Economics (Undergraduate)
Business, Accounting and Economics (Undergraduate)

This course provides students with the foundation to conduct a retirement needs analysis for individuals. In addition, students will understand the different types of retirement plans available to individuals and recognize the key factors that affect retirement plan selection for business owners. Students will evaluate and compare the characteristics of various retirement plans, address client suitability, and provide plan recommendations. The course covers tax-deferred retirement plans, IRAs, nonqualified plans, Social Security, Medicare, Medicaid, distribution strategies, taxation of distributions, and regulatory considerations. The course and curriculum are approved by the CFP Board of Standards. This course is an online class offered through the Lower Cost Models Consortium.

Prerequisite(s): Grade of "C-" or higher in BUSAD 3710 General Principles of Financial Planning.