Nebraska Wesleyan University

BUSAD 3750 Retirement Savings & Income Planning

Catalog

2026-2027

Course Description

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.

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

This course is offered online through a consortium of accredited colleges and universities. Instruction is provided by faculty employed by partner institutions within the consortium, with technology and administrative support provided by Rize Education. Oversight of courses offered through the consortium are reviewed and approved by Nebraska Wesleyan University. Students register through Nebraska Wesleyan University and receive academic credit from Nebraska Wesleyan University.

Course Hours

3 hours

Departments

1. Business, Accounting and Economics (Undergraduate)