

FIN 3715 - Planning Your Financial Future

Fall 2026 Syllabus, Section 01, CRN 41294,

Credit hours: 3

Instructor

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Public Instructor Information

Instructor Title: Associate Professor of Finance

Instructor Professional Qualifications: Ph.D., CFA, CFP

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Course Description

3715. Planning Your Financial Future. An introductory course to personal finance planning. Emphasis on establishing financial goals and monitoring progress toward reaching those goals to improve the individual's quality of life. Topics include financial planning process, budgeting, credit, financing strategies, education planning, tax planning, etc.. Open to business and non-business majors. Prereq.: 2.5 GPA. 3 s.h.

Course Readings

Group	Title	Author	ISBN
Required	Personal Finance: Turning Money Into Wealth 9th Edition	Keown, Arthur	13: 9780137504169

Please use the following link to register purchase the textbook. Homework assignments and e text are included in your purchase. If you already bought a textbook from the book store, you can use your access code **chen60189** to access the material.

<https://mlm.pearson.com/enrollment/chen60189>

The course readings are subject to change in the event of extenuating circumstances, research developments, current events, and/or to ensure better learning.

Weekly Schedule

Week of	Reading(s)	Proposed Topic	Due/To Prepare for Class
8/24	Chapter 1	Overview of financial planning	Chapter 1 Homework
8/31	Chapter 2	Measuring your financial health and making a plan	Chapter 2 Homework
9/7	Chapter 3	Time value of money and goal planning	Chapter 3 Homework
9/14	Chapter 4	Tax planning and strategies	Chapter 4 Homework
9/21	Exam I and Review		
9/28	Chapter 5	Liquidity assets management	Chapter 5 Homework
10/5	Chapter 6	Using credit cards	Chapter 6 Homework
10/12	Chapter 7	Consumer Loans	Chapter 7 Homework
10/19	Chapter 8	Housing and auto decisions	Chapter 8 Homework
10/26	Exam II and Review		
11/2	Chapter 9	Life and health insurance	Chapter 9 Homework
11/9	Chapter 10	Property and liability insurance	Chapter 10 Homework
11/16	Chapter 11 Chapter 14	Investment	Chapter 11 and 14 Homework

11/23	Chapter 15	Retirement Planning	Chapter 15 Homework
11/30	Chapter 16	Estate Planning	Chapter 16 Homework
12/7	Final Exam		

The course schedule, policies, procedures, and assignments in this course are subject to change in the event of extenuating circumstances, by mutual agreement, and/or to ensure better learning.