MAJOR GOALS AND LEARNING OUTCOMES FOR THE B.S. IN BUSINESS ADMINISTRATION/FINANCIAL SERVICES MAJOR PROGRAM

I. Acquire the skills necessary to participate in managing a financial services company

   Student Learning Outcomes:
   SLO #1.1: Describe the dimensions of performance and risk relevant to financial services companies.
   SLO #1.2: Calculate contemporary financial measures of performance and risk.
   SLO #1.3: Describe contemporary managerial risk management oversight processes.
   SLO #1.4: Explain how the financial services component industries (insurance, banking, securities, real estate and financial planning) interact.

II. Assess consumer financial needs and the mechanisms available for fulfilling these needs.

   Student Learning Outcomes:
   SLO #2.1: Describe the various financial products, services, and strategies offered by the variety of financial services institutions.
   SLO #2.2: Evaluate financial products and strategies offered by the variety of financial services institutions for suitability and appropriateness in meeting consumer needs.

III. Describe and apply financial concepts, theories and tools.

   Student Learning Outcomes:
   SLO #3.1: Describe measures of risk and approaches to managing risk.
   SLO #3.2: Apply valuation techniques.
   SLO #3.3: Explain the structure of the financial markets.

IV. Evaluate the role of technology and the legal, ethical and economic environment as it relates to financial services.

   Student Learning Outcomes:
   SLO #4.1: Analyze the impact of tax and pension law on various financial decisions including accumulation of wealth.
   SLO #4.2: Identify conflicts of interest between market participants and between principal and agent.
   SLO #4.3: Evaluate the economic environment and the impact of governmental economic policies on consumers and financial services firms.
   SLO #4.4: Explain how laws and regulations governing the operation of financial service firms and of the financial planning profession affect clients.
SLO #4.5: Describe the impact that financial innovation, advances in technology, and changes in regulations has had on the structure of the financial services industry.

V. Prepare students who wish to practice personal financial planning.

Student Learning Outcomes:

SLO #5.1: Analyze the impact of pension law on various financial decisions including accumulation and transfer of wealth.

SLO #5.2: Design hedging strategies to manage market risk.

SLO #5.3: Evaluate an individual’s assets for efficient distribution to heirs or through charitable gifts.

SLO #5.4: Design and evaluate employee benefits plans and aid individuals in making choices among current plan elections.

SLO #5.5: Design and evaluate portfolios of securities and asset classes aimed at achieving personal goals.

SLO #5.6: Prepare a plan for efficient wealth creation and management including planning for cash and debt management, investing, insurance, retirement, education needs, incapacity, and efficient wealth transfer.