

**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.