

# Finance (FNCE) 323

## Personal Finance: Special Topics (Revision 2)

**Status:** Replaced with new revision, see the [course listing](#) for the current revision ✖

**Delivery mode:** **Individualized study online.** Delivered via Brightspace.

**Credits:** 3

**Area of study:** Applied Studies (Business and Administrative Studies)

**Prerequisites:** **FNCE 322, FNCE 370, LGST 369, and TAXX 301**

**Precluded:** None

**Challenge:** FNCE 323 is not available for challenge.

**Faculty:** **Faculty of Business**

## Overview




FP Canada provides a comprehensive Financial Planning Body of Knowledge (FP-BoK) to outline the knowledge of CFP professionals and QAFP professionals. The FP-BoK comprises 12 broad topic areas. This course will follow the FP-BoK outline, but will provide content and learning activities only for those topics required for the QAFP that are not adequately covered elsewhere in the Athabasca University curriculum. Students who choose to take an exam from FP Canada will be responsible for the learning outcomes specified by FP Canada.

This course will point you to other courses where you should have learned FP-BoK material and fill in gaps. As such, while this course is shaped like a unified whole, for purposes of FP Canada exam preparation, you will need to access content from a variety of AU courses. Your assessments for this course will focus exclusively on the content provided within it, which addresses curriculum gaps for FP Canada purposes. Specific FNCE 323 learning outcomes will be presented for these topics.

## Outline

- Topic 1: Financial Planning Profession and Financial Services Industry Regulation
- Topic 2: Financial Analysis [no content for this topic]
- Topic 3: Credit and Debt
- Topic 4: Registered Retirement Plans
- Topic 5: Government Benefit Plans
- Topic 6: Registered Education and Disability Plans
- Topic 7: Economics
- Topic 8: Investments [no content for this topic]
- Topic 9: Taxation
- Topic 10: Law
- Topic 11: Insurance
- Topic 12: Human Behaviour [no content for this topic]

## Evaluation

Your final grade in *FNCE 323* is based on four quizzes and one Final Examination. You must achieve a minimum grade of 50 percent on the Final Examination and an overall course grade of at least **D (50 percent)**  to pass the course.

The following chart describes the credit weight associated with each course requirement:

Activity	Weight
Quiz 1	10%
Quiz 2	10%
Quiz 3	5%
Quiz 4	5%
Final Examination	70%
<b>Total</b>	<b>100%</b>

The **final examination** for this course must be requested in advance and written under the supervision of an AU-approved exam invigilator. Invigilators include either ProctorU or an approved in-person invigilation centre that can accommodate online exams. Students are responsible for payment of any invigilation fees. Information on exam request deadlines, invigilators, and other exam-related questions, can be found at the [Exams and grades](#) section of the Calendar.

To learn more about assignments and examinations, please refer to Athabasca University's [online Calendar](#).

## Materials

This course either does not have a course package or the textbooks are open-source material and available to students at no cost. This course has a **Course Administration and Technology Fee**, but students are not charged the Course Materials Fee.

This course uses electronic materials as resources for learning. There is no textbook for this course, but the course provides extensive links to online resources, particularly to websites managed by the Government of Canada.

## Important links

- **Academic advising**
- **Program planning**
- **Request assistance**
- **Support services**

Athabasca University reserves the right to amend course outlines occasionally and without notice. Courses offered by other delivery methods may vary from their individualized study counterparts.

*Opened in Revision 2, October 28, 2022*

*Updated December 3, 2024*

View **previous revision** 

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