HDFP 510. Fundamentals of Family Financial Planning. 3 Credits. (3 Lec) F,S
PREREQUISITE: Graduate standing. This course provides an overview of family financial planning by integrating concepts and issues with planning and counseling applications. Students will be introduced to the key concepts of family financial planning, including: insurance, tax investments, retirement, and estate planning. The family financial planning process is introduced with an emphasis on the integration and application of concepts in meeting individual and family financial goals and objectives. Other topics presented include an ethics overview, compensation trends within the industry, and regulatory frameworks. This course is offered as a distance-delivered course from Kansas State University.

HDFP 515. Insurance Planning for Families. 3 Credits. (3 Lec) F,S
PREREQUISITE: Graduate standing. This course covers risk management concepts, tools, and strategies for individuals and families, as well as ethical consideration. Case studies provide experience in selecting insurance.

HDFP 520. Investing for Family’s Future. 3 Credits. (3 Lec) F,S
PREREQUISITE: Graduate standing. This course covers various aspects of the principles of investments and their application to family financial planning. Topics include risk analysis, risk reduction, expected returns of various investments, and the nature of securities markets and investment companies.

HDFP 525. Retirement Planning, Employee Benefits, and Families. 3 Credits. (3 Lec) F,S
PREREQUISITE: Graduate standing. This course covers retirement planning for the individual and the family. Topics include qualified retirement plans, nonqualified plans, IRAs and other plans that offer tax advantages to the individual and family.

HDFP 530. Estate Planning for Families. 3 Credits. (3 Lec) F,S
online only PREREQUISITE: Graduate standing. Course covers the basics of estate planning for families including understanding the basic elements of estate planning, analyzing case studies of estate planning situations, and developing skills to work with families on estate planning problems.

HDFP 540. Personal Income Taxation. 3 Credits. (3 Lec) F,S
PREREQUISITE: Graduate standing. Course covers the basics of personal income taxation including taxation terminology, taxation issues in investments, taxes and retirement planning, tax management techniques, tax implications in marriage and other close relationships, and other tax topics related to family financial well-being.

HDFP 545. Financial Theory and Research I. 3 Credits. (3 Lec)
PREREQUISITE: Graduate standing. This course introduces students to the social science of family relationships as they relate to processes of family finance and financial planning. The course will cover several theories of family development and functioning, the family as an economic unit, and the interaction of the economy and families. This course is designed to help financial planning students better understand the financial decision-making processes of families through theoretical frameworks and published research.

HDFP 550. Housing/Real Estate. 3 Credits. (3 Lec) S
online only PREREQUISITE: Graduate standing. An overview of the role of housing and real estate in the financial planning process from a theoretical perspective. Taxation, legal aspects, mortgages, and financial calculations related to home ownership and real estate investments are included. New and emerging issues in the context of housing and real estate will be emphasized. The role of ethics in financial planning with housing and real estate will also be included. This course is offered as a distance-delivered course from Oklahoma State University.

HDFP 555. Financial Counseling. 3 Credits. (3 Lec) F,S
online only PREREQUISITE: Graduate standing. This course emphasizes the development of professional skills for assisting individuals and families to become responsible financial managers through the financial counseling process. Professionals with financial counseling preparation may assist in preventing, alleviating, and/or eliminating financial problems.

HDFP 560. Professional Practices in Family Financial Planning. 3 Credits. (3 Lec) F,S
online only PREREQUISITE: Graduate standing. This course will cover the professional practice of family financial planning including the process of planning and counseling, ethics of professional practice, types of organizations offering planning and counseling services, and the evaluation of effectiveness in planning and counseling.
Font Notice

This document should contain certain fonts with restrictive licenses. For this draft, substitutions were made using less legally restrictive fonts. Specifically:

Times was used instead of Adobe Garamond Pro.

The editor may contact Leepfrog for a draft with the correct fonts in place.