CBM003 ADD/CHANGE FORM

Undergraduate Council  or  Graduate/Professional Studies Council
[ ] New Course  [ ] Course Change
[ ] New Course  [ ] Course Change
Core Category: _____  Effective Fall 2013  Effective Fall 2013

1. Department: Finance  College: BUS

2. Faculty Contact Person: Joaquin Diaz-Saiz  Telephone: 34713  Email: jdiaz-saiz@uh.edu

3. Course Information on New/Revised course:
   - Instructional Area / Course Number / Long Course Title:
     FINA / 4352 / Personal Financial Planning
   - Instructional Area / Course Number / Short Course Title (30 characters max.)
     FINA / 4352 / PERSONAL FINANCIAL PLANNING
   - SCH: 3.00  Level: SR  CIP Code: 5208010016  Lect Hrs: 3  Lab Hrs: 0

4. Justification for adding/-changing course: Successfully taught as a selected topics course

5. Was the proposed/revised course previously offered as a special topics course?  [ ] Yes  [ ] No
   If Yes, please complete:
   - Instructional Area / Course Number / Long Course Title:
     FIN 4397 / Personal Financial Planning
   - Course ID: 22709  Effective Date (currently active row): 8272012

6. Authorized Degree Program(s): BBA
   - Does this course affect major/minor requirements in the College/Department?  [ ] Yes  [ ] No
   - Does this course affect major/minor requirements in other Colleges/Departments?  [ ] Yes  [ ] No
   - Can the course be repeated for credit?  [ ] Yes  [ ] No (if yes, include in course description)

7. Grade Option: Letter (A, B, C, ...) Instruction Type: lecture ONLY  (Note: Lect/Lab info. must match item 3, above.)

8. If this form involves a change to an existing course, please obtain the following information from
   the course inventory: Instructional Area / Course Number / Long Course Title
   / 0 /
   - Course ID: _  Effective Date (currently active row): 

9. Proposed Catalog Description: (If there are no prerequisites, type in "none").
   Cr: 3. (3-0).  Prerequisites: junior standing, ECON 2304, FINA 3332, and STAT 3331.  Description (30
   words max.): Elements of the personal financial planning process. Includes budgeting, credit management
   and cash flow management, personal income taxes and insurance, investing, retirement planning, financial
   security and independence.

10. Dean's Signature: __________________________________________  Date: 10/10/12

   Print/Type Name: Teri Elkins Longacre

- Created on 10/8/2012 5:14:00 PM -