

**2007 PROGRAM DIRECTOR'S CONFERENCE
SEPTEMBER 7-8 2007
WASHINGTON STATE CONVENTION AND TRADE CENTER
SEATTLE, WASHINGTON**

SESSION: #977513

BEST PRACTICES OF ONLINE LEARNING

Discussion of best practices when beginning or adding online learning to financial planning curricula

FRIDAY, SEPTEMBER 7, 2007
4:00 PM – 4:50 PM

PRESENTER:

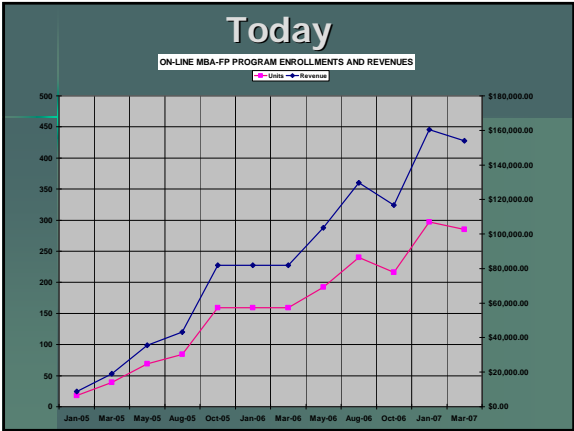
Dr. Somnath Basu, Ph.D.
California Lutheran University
60 West Olsen Road, Suite 3500
Thousand Oaks, CA 91360

Dr. Basu is a Professor of Finance at California Lutheran University and the Director of its California Institute of Finance. Dr Basu earned his B.A. in Economics, University of Delhi, MBA (Finance), Marquette University and a Ph.D. (Finance), University of Arizona. Dr. Basu is extensively published in the field of financial planning and is an award winning teacher. He has significant consulting experience with US Fortune 100 companies, advising institutional money managers and in developing proprietary financial planning software.

Dr. Basu recently chaired the Model Curriculum Revision Committee for the CFP Board of Standards and on the Executive Committee of the Program Directors Conference, Co-Chair of the Global Co-Curriculum Committee for the FPSB and is on the Executive Committees of both US and International CFP Program Directors. He is a founding member of the Foresight Group, an FPA think-tank group. His new book, co-authored with Professors' Block and Hirt, "Investment Planning for Financial Professionals" written specifically for planners, was released by McGraw Hill, in May 2006.

MBA Financial Planning

CALIFORNIA INSTITUTE OF FINANCE



Two And A Half Years Ago...

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Ventura County Star Local Support & Recognition

**Pioneers in Online Education
CLU's Online MBA Program Called 'A Noble Experiment'**

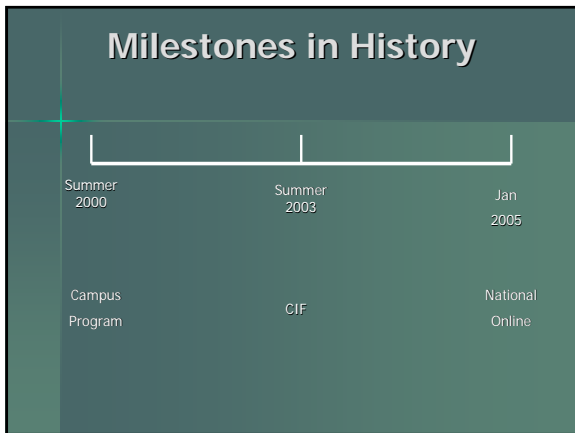
Author(s): *Alicia Doyle*
 Date: *December 13, 2004*
 Section: *Business and Stocks*

Correspondent California Lutheran University is launching an online MBA program in financial planning that educators say is the first of its kind. Beginning in January, students will have the opportunity to get certified via live chat rooms, e-mail, message boards, Web pages, Power Point presentations and pre-recorded lectures. People who complete the course successfully are eligible to sit for the CFP Certification Examination, said Somnath Basu, director of the California Institute of Finance and a finance professor in the School of Business at California Lutheran University in Thousand Oaks. "This is rare because there are only 14 programs in the country with an MBA in financial planning, and none of them are online," Basu said. The CLU campus offers the only CFP board-registered program that features an online master of business administration program geared solely toward financial services professionals, he said. The program is based on a rigorous curriculum and registered by Certified Financial Planner Board of Standards Inc. in Denver, Colo. "We have big hopes for the future," said Ann Farnham, project manager for the online program. ...

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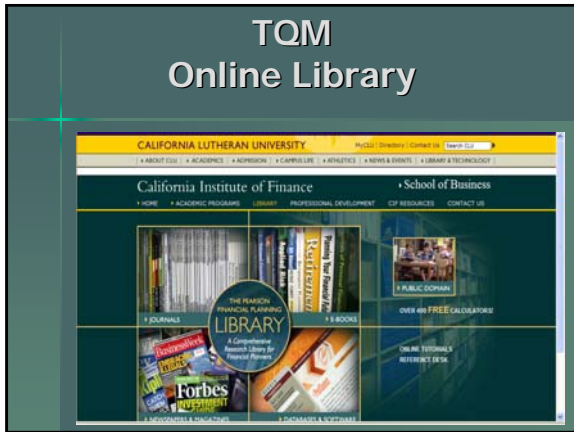


Today



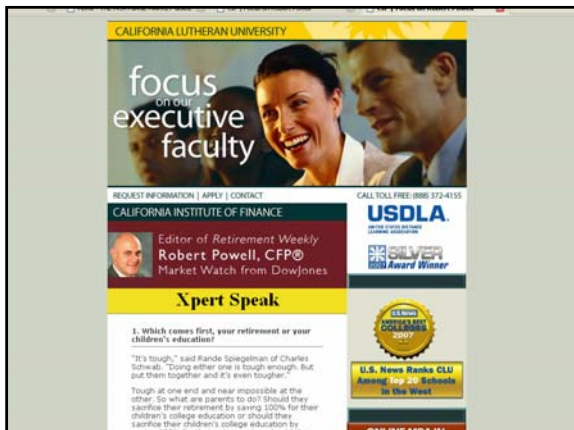
- ### Strategy
- Use regional success
 - TOM
 - Marketing – if you build it.....

TQM Online Library



TQM Executive Faculty

<u>Christine De Rosa</u>	<u>Sid Mittra</u>
<u>Daniel Moisand</u>	<u>Robert Powell</u>
<u>Marv Tuttle</u>	<u>Steve Vernon</u>
<u>Richard Wagner</u>	<u>David Yeske</u>
<u>Marcee Yager</u>	<u>Elizabeth Jetton</u>



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CALIFORNIA INSTITUTE OF FINANCE VIRTUAL CAMPUS

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U.S. News Ranker CLU Awarding top 20 @schools in the West

Program Accreditation
American Council on Education
120 National Institutes

ONLINE MBA IN FINANCIAL PLANNING PROGRAM BENEFITS

TQM
Cutting Edge Technology

The Castwights

10 of 28

TQM
Video Game-Based Case Study

The Castwights

16 of 28

Income Statement
For: Ms. Suzy Cartwright Baker
From Jan. 1, 2006 to Dec 31, 2006

INCOME
Wages and salaries
Investment income
Other INCOME

TOTAL INCOME

EXPENSES
Fixed
Life insurance

Listen to the conversation and enter relevant figures in the fields above. Click **Confirm** when you're done. You may click the **Traverse** button to read the conversation script.

Confirm

Age Banding in Retirement Planning

Financial Planning

Active Learning: Participation is Key

Age Banding in Retirement Planning © 2002 Dr. Somnath Basu

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16	Retirement	2
17	Retirement	2
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20	Retirement	2

WIMBA
A Virtual Classroom

Almost 7 in 10 workers (68 percent) expect to work into retirement but 4 in 10 believe end up having to leave the work force earlier than expected due to health problems, disability or company downsizing.

About half cash out their 401(k) savings when they change jobs instead of rolling it over into an IRA to avoid tax implications and to continue saving and investing for their retirement.

Today
More Local Support & Recognition
Pacific Coast Business Times

Basu honored for program

Somnath Basu, director of California Lutheran University's online master of business administration program, has won an award from the U.S. Distance Learning Association.

Basu received a silver award in the regionally recent competition. The award recognizes Basu's efforts in developing an accredited program in financial planning that's targeted at mid-level professionals.

Basu's program works closely with the Chartered Financial Institute Board of Standards and candidates can receive a CFP designation in addition to the MBA degree. The program runs on a combination of Adobe Blackboard, WebQuest and Wimba Live Classroom systems.

Basu recently received long-term (10-year) accreditation for an age-related strategy for investments used to adapt to individual or product higher returns. The approach also would help investors manage the shift from funding between-time activities to funding health care costs as they get older.

—Business Times reporting



Tomorrow

Building the Institute

- National Conference
- Online FP literacy and education for underserved women
- Expand fellowship program
- International programs
- Alumni Center

CFP® GRANT AWARDED

CLU Women in the News

CLU MBA Student Feted as Woman of Confidence

Our MBA student (and Finance, CA Merit Pro Team) Public Finance

CIF is Awarded Grant for the Benefit of Underserved Women

Grant will fund:

- Financial Literacy Center
- Online Education for Women

Services Provided:



- Personal Budgeting
- Debt Relief
- Children's Education Funding
- Retirement Planning
- Divorce Planning
- Estate Planning

Groups Served:

- Single Mothers
- Widows
- Divorced Women
- Ethnic Minorities
- Low to Middle Income Women

Denver, CO August, 2007 - The CFP® Board awards grant funding to projects that are developing innovative and sustainable methods of bringing the benefits of financial planning to communities not traditionally reached by the financial planning profession.

One of the CFP® Board 2007 grant recipients is California Lutheran University's California Institute of Finance. The CIF Information Center for Women is an online program initiated by CIU to provide financial planning services free (for basic information) or at minimal cost (for individual consulting) to low- and middle-income women. This program will benefit the underserved women in the financial arena, especially

Assessing Needs

- High quality personnel
- Budget for activities
- Wisdom

Thank You

Towards an
University of Distinction

The End
