

**2007 PROGRAM DIRECTOR'S CONFERENCE
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WASHINGTON STATE CONVENTION AND TRADE CENTER
SEATTLE, WASHINGTON**

SESSION: #977515

ADDING NEW CONTENT TO CURRICULUM

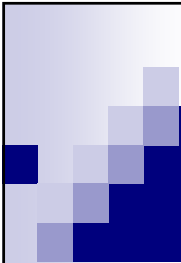
Discussion on best practices when adding new content, ideas and/or courses to existing financial planning curriculum

SATURDAY, SEPTEMBER 8, 2007
8:00 AM – 8:50 AM

PRESENTER:


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Sharon A. DeVaney is a professor in the Department of Consumer Sciences and Retailing at Purdue University. She is the CFP Program Director and teaches undergraduate and graduate courses. Her research interests include retirement planning, self-employment, and credit use. Her research has been funded by AARP, National Institute on Aging, USDA, and National Endowment for Financial Education. Four of her research papers have received awards from the CFP Board.




Adding New Content to the Curriculum

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Overview

- Characteristics of your students
- Your existing curriculum
- CFP® certification requirements
- Environment
- Resources



Your Students

- Certificate
 - Somewhat older
 - Work experience and or changing careers
- Undergraduate & graduate
 - Younger
 - Lack experience
 - Might be experienced

Existing Curriculum

- 5 Topic Areas
 - Insurance
 - Tax Planning
 - Investments
 - Retirement Planning & Employee Benefits
 - Estate Planning
- Other required courses?
 - Introduction to FP, Case Study, Ethics, etc.

CFP® certification requirements

- Model curriculum could be a guide
- 5 topic areas
- Code of ethics
- Topic list for exams

Certified Financial Planner Board of Standards, Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Environment

- Changes in regulations
- The Economy
- Technology
- Demographic trends: aging, more singles, more female business owners, etc.
- New products and/or services

Resources

- Availability of qualified instructors
- Classrooms
- On line instruction
- Accessible to students: time, location, etc.
- Other

How to determine if change is needed

- CFP Board
- Environment and/or economy
- Informal visits with your graduates
- Informal visits with employers
- Survey: online or mail
- External input: advisory board or review panel

At Purdue University

- Added Case Study course in 1992
 - Input from graduates and employers
- Added Ethics course in 1997
 - Input from Advisory Board
- Added Internship in 2002
 - Result of mail survey to all graduates
 - Financial services
 - Social Security, Counseling Clinics, etc.

Survey of graduates

- How satisfied are you in your current job?
- Compared with what you expected, is your job (as expected, worse, or better)?
- What courses should be required in addition to those you completed?
- What suggestions do you have to improve the curriculum/program?

Additional suggestions

- Encourage minors
- Extra-curricular experiences
 - FP club, service learning, FP competition, FPA chapter
- Study abroad
- More than one internship

Questions and Suggestions
