### Undergraduate Programs—COURSE CHANGE REQUEST

<table>
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<tr>
<th>DEPARTMENT: Finance</th>
<th>COLLEGE: College of Business</th>
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<tr>
<th>COURSE PREFIX AND NUMBER: RM4118</th>
<th>CURRENT COURSE TITLE: LIFE INSURANCE AND PENSIONS</th>
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**Change(s) are to be effective (list term):** Spring 2014

**Current Course Title:** Life Insurance and Pensions

**Change Description to:**
- Financial services and personal financial planning is one of the most dynamic fields, which includes investments, risk management and insurance, banking, and estate and retirement planning, among others.
- This course discusses important personal financial planning components including life insurance, health insurance (medical expense plans, Medicare and Medicaid, disability income insurance, long-term care insurance), retirement planning (employer-sponsored retirement plans, nonqualified plans, IRAs, and annuities), and estate planning. Other important topics covered include life settlements, mortality bonds, employee benefits, insurance fraud, family trusts, QPRTs, private annuities, and reverse mortgage. This course employs materials and techniques that are consistent with modern principles and best practices, providing knowledge and skills that students can use immediately.

**Change General Education Requirements**

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<th>Add*</th>
<th>Remove</th>
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*WAC and General Education criteria must be clearly indicated in attached syllabus. For WAC Guidelines: www.fau.edu/WAC.*

Please attach General Education Course Approval Request: www.fau.edu/deanofstudies/GeneralEdCourseApprovalRequests.php

**Change WAC/Gordon Rule Status**

| Add* | Remove |

**Term to**

**Change Prerequisites/Minimum Grades to**

**Change Corequisites to**

**Change Registration Controls to**

*Please list existing and new pre/corequisites, specify AND or OR and include minimum passing grade (default is D-).*

### Attach syllabus for ANY changes to current course information.

Should the requested change(s) cause this course to overlap any other FAU courses, please list them here.

N/A

Please consult and list departments that might be affected by the change(s) and attach comments:

N/A

**Faculty contact, email and complete phone number:**

Charles C. Yang, cyang1@fau.edu, 7-4181

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**Approved by:**

Department Chair: [Signature]

College Curriculum Chair: [Signature]

College Dean: [Signature]

UUPC Chair: [Signature]

Undergraduate Studies Dean: [Signature]

UFS President: [Signature]

Provost: [Signature]

**Date:**

11/7/13

11/22/13

11/3/13

12/16/13

12/21/13

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1. Syllabus must be attached; syllabus checklist recommended; see guidelines and checklist: www.fau.edu/academic/Registrar/UUPCinfo


3. WAC approval (attach if necessary)

4. Gen. Ed. approval (attach if necessary)

5. Consent from affected departments (attach if necessary)

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Email this form and syllabus to mjenning@fau.edu seven business days before the University Undergraduate Programs Committee meeting so that materials may be viewed on the UUPC website prior to the meeting.

*FAUchange—Revised September 2012*