

# FLORIDA ATLANTIC UNIVERSITY™

## Undergraduate Programs—COURSE CHANGE REQUEST<sup>1</sup>

UUPC APPROVAL 12/6/13  
 UFS APPROVAL \_\_\_\_\_  
 SCNS SUBMITTAL \_\_\_\_\_  
 CONFIRMED \_\_\_\_\_  
 BANNER POSTED \_\_\_\_\_  
 CATALOG \_\_\_\_\_

<b>DEPARTMENT: FINANCE</b>	<b>COLLEGE: COLLEGE OF BUSINESS</b>
<b>COURSE PREFIX AND NUMBER: RMI4116</b>	<b>CURRENT COURSE TITLE: LIFE INSURANCE AND PENSIONS</b>
<b>CHANGE(S) ARE TO BE EFFECTIVE (LIST TERM):</b> <u>Spring 2014</u>	<b>_____ TERMINATE COURSE (LIST FINAL ACTIVE TERM):</b>
<b>CHANGE TITLE TO:</b> INSURANCE AND FINANCIAL PLANNING  <b>CHANGE PREFIX FROM: _____ TO: _____</b>  <b>CHANGE COURSE NO. FROM: _____ TO: _____</b>  <b>CHANGE CREDITS<sup>2</sup> FROM: _____ TO: _____</b>  <b>CHANGE GRADING FROM: _____ TO: _____</b>  <b>CHANGE WAC/GORDON RULE STATUS<sup>3</sup></b> ADD* _____ REMOVE _____  <b>CHANGE GENERAL EDUCATION REQUIREMENTS<sup>4</sup></b> ADD* _____ REMOVE _____  *WAC and General Education criteria must be clearly indicated in attached syllabus. For WAC Guidelines: <a href="http://www.fau.edu/WAC">www.fau.edu/WAC</a> . Please attach General Education Course Approval Request: <a href="http://www.fau.edu/deanugstudies/GeneralEdCourseApprovalRequests.php">www.fau.edu/deanugstudies/GeneralEdCourseApprovalRequests.php</a>	<b>CHANGE DESCRIPTION TO:</b> <del>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.</del> 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.  <b>CHANGE PREREQUISITES/MINIMUM GRADES TO*:</b> <b>CHANGE COREQUISITES TO*:</b> <b>CHANGE REGISTRATION CONTROLS TO:</b> *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. <sup>5</sup> N/A
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Faculty contact, email and complete phone number:  
 Charles C. Yang, [cyang1@fau.edu](mailto:cyang1@fau.edu), 7-4181

<b>Approved by:</b> Department Chair: <u>[Signature]</u> College Curriculum Chair: <u>[Signature]</u> College Dean: <u>[Signature]</u> UUPC Chair: <u>[Signature]</u> Undergraduate Studies Dean: <u>[Signature]</u> UFS President: _____ Provost: _____	<b>Date:</b> <u>11/7/13</u> <u>11/22/13</u> <u>11.23.13</u> <u>12/6/13</u> <u>12/12/13</u>	<ol style="list-style-type: none"> <li>1. Syllabus must be attached; syllabus checklist recommended; see guidelines and checklist: <a href="http://www.fau.edu/academic/registrar/UUPCinfo">www.fau.edu/academic/registrar/UUPCinfo</a></li> <li>2. Review Provost Memorandum: <b>Definition of a Credit Hour</b> <a href="http://www.fau.edu/provost/files/Definition_Credit_Hour_Memo_2012.pdf">www.fau.edu/provost/files/Definition_Credit_Hour_Memo_2012.pdf</a></li> <li>3. WAC approval (attach if necessary)</li> <li>4. Gen. Ed. approval (attach if necessary)</li> <li>5. Consent from affected departments (attach if necessary)</li> </ol>
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Email this form and syllabus to [mjenning@fau.edu](mailto: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.