BUS-F260 Personal Finance

Brief Info

School of Business, Indiana University Southeast

Instructor and Contact Information

Name: Yan He

Yan He's Professional Website

Phone: 812-941-2308

Email: Canvas Inbox (preferred); IU email

Zoom: Zoom Link (in the left navigation bar of Canvas course site)

Office hours: see the syllabus of a specific semester. Zoom meeting (or office meeting) is by appointment.

Course Status, Prerequisites, and Description

Course status

2nd-Year Seminar Elective (Undergraduate)

Course prerequisites: none

Course description

IUS bulletin (BUS-F260): Financial problems encountered in managing individual affairs; family budgeting, use of credit, insurance, home ownership, investing in securities, retirement, and estate planning.

Suggestions from the instructor

This course is mainly for non-business majors. For business majors and finance-concentration students, please try to take this course before BUS-F301. This course covers some entry-level materials of the Certified Financial Planner (CFP).

Texts

Textbook: Personal Financial Planning, by Randy Billingsley, Lawrence Gitman, and Michael Joehnk. Edition: see the syllabus of a specific semester.

Course Outline

T00 Welcome and Course Introduction

T01 Cash and Savings

T02 Automobile and Housing

T03 Credit

T04 Consumer Loans

T05 Insurance

T06 Investment Planning

T07 Retirement Planning

T08 Estate Planning

T09 Personal Financial Planning