**PAC Form Item #3: Mapping**

**• New Course: Map course to its program(s).**

**• Existing Course: If SLOs have changed, complete worksheet(s).**

**Instructions:**

* On the worksheet, identify the course.
* Review the learning goals/SLOs (referred to as Degree Learning Outcomes on the worksheet) for the MSBA in Financial & Tax Planning. The goals are listed, in brief on the worksheet however they should be reviewed in detail at: <http://cbaweb.sdsu.edu/assets/files/assessment/goals/2012/MSBA-financial-planning.pdf>.
* If a given goal/SLO is a primary focus of the course, indicate this by placing an “X” in the Primary Focus column.
  + Note: *A topic that is part of a course is not necessarily the primary focus of the course. For example, “Evaluate and resolve ethical dilemmas facing financial planners” may be a primary focus of a more advanced course. That topic may also be introduced/covered in a course an earlier course but is not a primary focus of that course.*
* Consider whether some part of the course **Introduces**, **Reinforces**, and or **Applies** the goal/SLO being considered. If it applies, further consider whether the application takes place at the individual student level or in a group. Place an **“I”,** an **“R”,** an **“AI”** and/or an **“AG”** in the boxthat corresponds to the goal or SLO.
  + *Please use the following definitions:*
    - *Introduces:* ***(I)*** *A new concept, likely a student’s first exposure*
    - *Reinforces:* ***(R)*** *Furthering explanation and/or understanding of a previously introduced concept.*
    - *Applies (Individually):* ***(AI)*** *Requires “hands-on” activity of some type that is evaluated at an individual student level.*
    - *Applies (In a Group):* ***(AG)*** *Requires “hands-on” activity of some type that is completed by a group of students working together and is evaluated at the group level.*
  + *It is okay to place multiple letters in one box if the course does more than one thing. It is also okay to leave the box blank if the course does not relate to the goal/SLO. Please think concretely about the course’s SLOs, specific lectures and activities such as assignments, exercises, and exams. It is less helpful to draw a general conclusion that “everything I do in my class contributes to critical thinking [for example]” than to think in terms of a specific assignment that requires students in the class to demonstrate critical thinking skills and is evaluated based on the level of those skills demonstrated. It is* ***not*** *expected that a single course will contribute to all learning goals/SLOs nor cover all levels (introducing, reinforcing, applying). Remember that each course is one piece of a broader program. Programmatic learning goals/SLOs are accomplished by the introduction, reinforcement, and application of material over the range of courses in the program. It isn’t all expected to happen in one course!)*

**MSBA Financial & Tax Planning Worksheet**

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| **Course:** |  | |
| **Degree Learning Outcomes** | **Primary**  **Focus?** | **I, R, AI, AG?** |
| Determine a client’s financial status by constructing and interpreting their financial statements. |  |  |
| Recognize problems and opportunities, strengths and weaknesses of their current financial situation. |  |  |
| Evaluate clients’ psychological attitudes so that a plan can be implemented that is not only feasible but also psychologically appropriate to the clients. |  |  |
| Help clients enunciate their life goals, enumerate the financial aspects of those goals, evaluate their ability to meet their goals, devise a plan to meet those goals. |  |  |
| Evaluate the sufficiency of clients’ emergency funds, their preparation for fiscal stress, their credit worthiness and their use of debt and propose improvements in each. |  |  |
| Estimate the inflation adjusted cash flows and the present values for each goal, and build an accumulation plan to accomplish each goal. |  |  |
| Evaluate the economic and demographic environment to understand how it may affect clients’ plans, including current and anticipated interest and inflation rates, expected rates of return, and mortality. |  |  |
| Help clients identify elements of risk they face and select appropriate means of dealing with them: insurable risks, portfolio risks, hedgeable risks. |  |  |
| Evaluate investment choices and select the most appropriate choices from among various investment and insurance alternatives in order to help clients achieve specific goals. |  |  |
| Optimize a client’s after-tax well-being by understanding personal taxation and its effect on personal financial decisions. |  |  |
| Make choices of means in the transfer of wealth between generations and the use of gifts. Evaluate which optimizes the client’s well-being. |  |  |
| Aid both clients and firms in the selection of optimal choices among employee benefit alternatives. |  |  |
| Evaluate and resolve ethical dilemmas facing financial planners. |  |  |
| Recognize the legal and regulatory constraints within which planners operate. |  |  |
| Determine the appropriate business form for operating a financial planning practice. |  |  |