



**SOUTH DAKOTA BOARD OF REGENTS
ACADEMIC AFFAIRS FORMS**

**Revised Course Request: Unique Course
(Substantive Modification)**

SDSU	Nicole Klein	Jason Zimmerman	1/30/2025
Institution	Form Initiator	Dean's Approval Signature	Date
	College of Arts, Humanities and Social Sciences / Ness School of Management and Economics		
SDSU	Dennis D. Hedge	Dennis D. Hedge	3/26/2025
Institution	Division/Department	Institutional Approval Signature	Date

Section 1. Existing Course Title and Description

Prefix & No.	Course Title	Credits
CA 640	Fundamentals of Family Financial Planning	3

Course Description

Issues and concepts related to the overall financial planning process, and establishing client-planner relationships. Services provided, documentation required and client and CFP licensee responsibilities are explored. Competencies related to gathering of client data, determining goals and expectations, and assessing the client's financial status by analyzing and evaluating data are developed. Emerging issues and the role of ethics in financial planning are an integral part of the course.

Section 2. Modification(s) Requested

2.1. This modification will include:

- Prefix change CA to FIN
- Course Number CA 640 to FIN 500
- Instructional Method B - Competency-Based, Self-Paced Study to R - Lecture

Effective term of the change: Fall 2025

2.2. Add justification for all changes noted above:

The Ness School has completed a comprehensive review of the Consumer Affairs curriculum including the financial counseling and family financial planning coursework. The FIN prefix will better reflect the content of the course. In addition, the change of CIP code to 52.0804 (Financial Planning and Services) will better reflect content of the course.

Section 3. Other Course Information

3.1. Will this course equate (i.e., be considered the same course for degree completion) with any other unique or common courses in the common course database? Yes No

Section 4. Department and Course Codes (Completed by University Academic Affairs)

	<u>Current</u>	to	<u>New</u>
<input type="checkbox"/> Change in University Department	Ness School of Management and Economics	to	No change
<input type="checkbox"/> Change in Banner Department Code	SSME	to	No change
<input type="checkbox"/> Change in <u>CIP Code</u>	19.0402	to	52.0804