



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

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

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

**Section 1. Existing Course Title and Description**

<b>Prefix &amp; No.</b>	<b>Course Title</b>	<b>Credits</b>
CA 704	Estate Planning for Families	3

**Course Description**

Fundamentals of the estate planning process will be studied, including estate settlement, estate and gift taxes, property ownership and transfer, and powers of appointment. Tools and techniques used in implementing an effective estate plan; ethical considerations in providing estate planning services and new and emerging issues in the field will be explored. Case studies will provide experience in developing estate plans suitable for varied family forms.

**Section 2. Modification(s) Requested**

**2.1. This modification will include:**

- Prefix change CA to FIN
- Course Title Family Estate Planning
- Course Number CA 704 to FIN 533
- Dual-listing
- Course Prerequisite FIN 433: FIN 280; FIN 533: No Change
- 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 and revised course title will better reflect the content of the course. This course will be dual-listed at the 400- and 500-level. 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>		<u>New</u>
<input type="checkbox"/> <b>Change in University Department</b>	Ness School of Management and Economics	to	No change
<input type="checkbox"/> <b>Change in Banner Department Code</b>	SSME	to	No change
<input type="checkbox"/> <b>Change in <u>CIP Code</u></b>	19.0402	to	52.0804