



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

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

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

Section 1. Existing Course Title and Description

Prefix & No.	Course Title	Credits
CA 725	Family, Employment Benefits and Retirement Planning	3

Course Description

Study of micro and macro considerations for retirement planning. Survey of various types of retirement plans, ethical considerations in providing retirement planning services, assessing and forecasting financial needs in retirement, and integration of retirement plans with governmental benefits.

Section 2. Modification(s) Requested

2.1. This modification will include:

- Prefix change CA to FIN
- Course Title Family Retirement Planning
- Course Number CA 725 to FIN 534
- Dual-listing
- Course Prerequisite FIN 434: FIN 280; FIN 534: 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. As part of the transition, the Ness School reviewed the course content to eliminate duplicate material and improve efficiency. 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"/> 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