



**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 755	Financial Planning Case Study	3

Course Description

This course examines professional issues in financial planning, including ethical considerations, regulation and certifications requirements, communication skills, and professional responsibility. Students are expected to utilize skills obtained in other courses and work experiences in the completion of personal financial case studies, the development of a targeted investment policy, and other related financial planning assignments.

Section 2. Modification(s) Requested

2.1. This modification will include:

- Prefix change CA to FIN
- Course Title Family Financial Planning Capstone
- Course Number CA 755 to FIN 539
- Dual-listing
- Course Prerequisite FIN 439: FIN 431, FIN 432, FIN 433, FIN 434, and FIN 435; FIN 539: None to FIN 531, FIN 532, FIN 533, FIN 534, and FIN 535
- Dual-listing
- 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"/> 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