



**Bow Valley
College**

Course Outline

FNSR2996

Financial Planning

Capstone

Fall 2024 - Current

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FNSR2996 Financial Planning Capstone

COURSE DESCRIPTION

Learners apply the skills learned throughout their program to develop potential solutions to real-world problems faced by industry and community. Learners have the opportunity to demonstrate applied research, critical reflection, communication, and presentation skills while providing a viable, evidence-based, and practical response.

REQUISITES	<p>Complete all of the following</p> <ul style="list-style-type: none"> • Complete at least 45 credits from the following <ul style="list-style-type: none"> ◦ Financial Services Diploma major ◦ Earn a minimum grade of B- in each of the following courses <ul style="list-style-type: none"> ▪ MGMT1201 - Business Communication (3) ◦ Complete the following courses <ul style="list-style-type: none"> ▪ FNSR2301 - Financial Markets & Products (3) ▪ FNSR2302 - Personal Financial Planning I (3)
EQUIVALENTS	None
CREDITS	3
HOURS	45
ELIGIBLE FOR PLAR	Yes
ZERO TEXTBOOK COST	Yes

COURSE LEARNING OUTCOMES

Bow Valley College is committed to ensuring our graduates can demonstrate their abilities in key areas that will make them effective citizens and encourage their development as lifelong learners. In addition to the discipline-specific skills that learners acquire in their programs, the College has identified ten learning outcomes.

College-Wide Outcomes:

1. Communication
2. Thinking Skills
3. Numeracy and Financial Literacy
4. Working with Others
5. Digital Literacy
6. Positive Attitudes and Behaviours

7. Continuous Learning
8. Health and Wellness Awareness
9. Citizenship and Intercultural Competence
10. Environmental Sustainability

#	COURSE LEARNING OUTCOME(S)	COLLEGE WIDE OUTCOMES SUPPORTED
1	Demonstrate professional judgement in the role of a financial services professional.	1, 2, 3, 4, 6, 7, 9
2	Demonstrate professionalism in the role of a financial services professional.	1, 2, 3, 4, 6, 7, 9
3	Synthesize and evaluate information for application in the role of a financial services professional.	1, 2, 3, 4, 5, 6, 7, 9
4	Demonstrate professional communication skills in the role of a financial services professional.	1, 2, 3, 4, 6, 7, 9
5	Reflect on the Work Integrated Learning (WIL) experience as it relates to professional growth.	1, 2, 3, 4, 6, 7, 9

COURSE MODULES AND SCHEDULE

**Course schedule subject to change, depending on delivery mode and term of study. For exact dates, please consult the Course Offering Information in Brightspace.*

WEEK/HOURS MODULES

Week 1	Course introduction
Week 2	Research methodology
Week 3	Project management
Week 4	Financial literacy and poverty reduction
Week 5	Financial literacy and poverty reduction
Week 6	Financial counselling
Week 7	Financial counselling
Week 8	Financial counselling
Week 9	Reading Week
Week 10	Financial coaching
Week 11	Financial services technology
Week 12	Project work
Week 13	Project work
Week 14	Project delivery
Week 15	Reflection

ASSESSMENT

COURSE LEARNING OUTCOME(S)	ASSESSMENT	WEIGHT
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1, 2, 4	Team Charter	P/F
1, 2, 3, 4	Research Tutorial	P/F
1, 2, 3, 4	Capstone Community Project	P/F
1, 2, 3, 4, 5	In-class Activities and Engagement	P/F
5	Reflection	P/F

Important: For details on each assignment and exam, please see the Course Offering Information.

PERFORMANCE STANDARDS

A grade of P is required to pass this course. Learners may be required to pass this course in order to progress in the program or to meet specific program completion requirements.

Students are required to achieve a grade of P (pass) for all elements of the course in order to pass the course.

Please consult with the program area or the Bow Valley College website for further details.

GRADING SCHEME

Symbol	Description	Grade Point Value
P	Pass	N/A
F	Fail	N/A
BD	Basic/Developing (Foundational programming courses only)	N/A
CM	Complete	N/A
NCM	Not Complete	N/A

REQUIRED LEARNING RESOURCES

Additional learning resources may be found in the Course Offering Information or in Brightspace.

ADDITIONAL INFORMATION

Additional information may be found in the Course Offering Information or in Brightspace.

ACADEMIC ACCOMMODATIONS

Learners with a disability (learning, physical, and/or mental health) may qualify for academic and exam accommodations. For more information, or to apply for accommodations, learners should make an appointment with Accessibility Services in the Learner Success Services (LSS) Department. Accessibility Services can also assist learners who may be struggling with learning but do not have a formal diagnosis. To make an appointment visit LSS on the first floor of the south campus or call 403-410-1440. It is the learner's responsibility to contact Accessibility Services and request academic accommodations. For more information, please visit our website at <http://www.bowvalleycollege.ca/accessibility>.

INSTITUTIONAL POLICIES

Bow Valley College is committed to the highest standards of academic integrity and honesty. Learners are urged to become familiar with and uphold the following policies: Academic Integrity (500-1-7), Learner Code of Conduct, Procedures and Guidelines (500-1-1), Learner Appeals (500-1-12), Attendance (500-1-10), Grading (500-1-6), Academic Continuance and Graduation (500-1-5), and Electronic Communications (300-2-13). Audio or video recording of lectures, labs, seminars, or any other teaching and learning environment by learners is allowed only with consent of the instructor as part of an approved accommodation plan. Recorded material is to be used solely for personal study and is not being used or distributed without prior written consent from the instructor.

Turnitin:

Students may be required to submit their course work to Turnitin, a third-party service provider engaged by BVC. Turnitin identifies plagiarism by checking databases of electronic books and articles, archived webpages, and previously submitted student papers. Students acknowledge that any course work or essays submitted to Turnitin will be included as source documents in the Turnitin.com reference database, where it will be used solely to detect plagiarism. The terms that apply to a student's use of Turnitin are described on Turnitin.com.

Online Exam Proctoring:

Examinations for this course may require proctoring through an online proctoring service. Online proctoring enables online exam taking within a controlled and monitored environment, thereby enhancing

academic integrity. Online proctoring may occur through a variety of methods, including but not limited to:

- a. live online proctoring where a remote invigilator authenticates identity and observes completion of an exam using specialized software and recordings;
- b. automated proctoring where the exam session is recorded and AI (artificial intelligence) analyzed;
- c. browser lockdown that limits access to other applications, websites, copying, printing, screen capture and other functions; or
- d. a combination of both live/automated proctoring and browser lockdown.

Course instructors will review recordings, analyses, and data obtained through online proctoring for academic integrity infractions. It is the student's responsibility to meet the technical, software, location, and identity verification requirements necessary to enable online proctoring.

Further details of these policies are available in the Academic Calendar and on the Bow Valley College website, bowvalleycollege.ca.

Learners are encouraged to keep a copy of this course outline for future reference.

Collection of Personal Information:

This course, including your image and voice, may be recorded and made available to you and other students taking the course section. By attending the class(es) online or in person, you consent to the collection of your personal information. If you do not wish to be recorded, please contact your instructor before starting the course/class to discuss alternative arrangements.

You may use the recordings only for educational purposes and you must not copy, share, or use the recordings for any other purpose without the instructor's express permission.

Your personal information is collected in accordance with section 33(c) of the Freedom of Information and Protection of Privacy Act (Alberta) to deliver academic programming, support learner flexibility, promote universal design for learning principles, and for purposes consistent with the course activities and outcomes. If you have any questions about the collection, disclosure, use, or protection of this information, please contact the College's Access and Privacy Officer at foip@bowvalleycollege.ca.