## ASSESSMENT ALIGNMENT MATRIX
### FAMILY FINANCIAL PLANNING – M.S.

**MS SLOs** (a = written examinations; b = written assignments (including case studies); c = in-class activities (including role playing, class discussion, and group activities); d = out-of-class activities; e = presentations  K = knowledge assessment S = skills assessment)

<table>
<thead>
<tr>
<th><strong>Degree Student Learning Outcomes</strong></th>
<th>FSHS 624</th>
<th>FSHS 760</th>
<th>FSHS 762</th>
<th>FSHS 764</th>
<th>FSHS 766</th>
<th>FSHS 772</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Understand the fundamentals of the financial planning process.</td>
<td>a,b,c,d K,S</td>
<td>a,b,c,d K,S</td>
<td>a,b,c,d K,S</td>
<td>a,b,c,d K,S</td>
<td>a,b,c,d K,S</td>
<td>a,b,c,d K,S</td>
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<tr>
<td>2. Calculate and interpret the time value of money.</td>
<td>a,b,c,d K,S</td>
<td>a,b K,S</td>
<td>a,b K,S</td>
<td>a,b K,S</td>
<td>a,b K,S</td>
<td>a,b K,S</td>
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<tr>
<td>3. Develop a clear professional understanding of insurance policies and strategies.</td>
<td>a,b,c,d K,S</td>
<td>a,b K,S</td>
<td>a,b K,S</td>
<td>a,b K,S</td>
<td>a,b,c,d,e K,S</td>
<td>a,b K,S</td>
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<tr>
<td>4. Understand risk management concepts.</td>
<td>a,b,c,d K,S</td>
<td>a,b K,S</td>
<td>a,b K,S</td>
<td>a,b K,S</td>
<td>a,b,c,d,e K,S</td>
<td>a,b K,S</td>
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<tr>
<td>5. Apply tax planning strategies to meet the goals of the client.</td>
<td>a,b,c,d K,S</td>
<td>a,b K,S</td>
<td>a,b K,S</td>
<td>a,b K,S</td>
<td>a,b,c,d,e K,S</td>
<td>a,b K,S</td>
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<tr>
<td>6. Become skilled in applying retirement planning strategies.</td>
<td>a,b,c,d K,S</td>
<td>a,b,c,d,e K,S</td>
<td>a,b K,S</td>
<td>a,b K,S</td>
<td>a,b,c,d,e K,S</td>
<td>a,b K,S</td>
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<tr>
<td>7. Develop estate planning strategies for the benefit of clients.</td>
<td>a,b,c,d K,S</td>
<td>a,b K,S</td>
<td>a,b K,S</td>
<td>a,b,c,d,e K,S</td>
<td>a,b K,S</td>
<td>a,b K,S</td>
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<tr>
<td>8. Develop investment planning strategies to assist clients in meeting financial goals.</td>
<td>a,b,c,d K,S</td>
<td>a,b,c,d K,S</td>
<td>a,b,c,d K,S</td>
<td>a,b,c,d K,S</td>
<td>a,b,c,d K,S</td>
<td>a,b,c,d K,S</td>
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<tr>
<td>9. Apply knowledge to help others meet challenges.</td>
<td>c,d,e S</td>
<td>c,d,e S</td>
<td>c,d,e S</td>
<td>c,d,e S</td>
<td>c,d,e S</td>
<td>c,d,e S</td>
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<tr>
<td>10. Solve real world problems.</td>
<td>a,b,c,d,e K,S</td>
<td>a,b,c,d,e K,S</td>
<td>a,b,c,d,e K,S</td>
<td>a,b,c,d,e K,S</td>
<td>a,b,c,d,e K,S</td>
<td>a,b,c,d,e K,S</td>
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<tr>
<td>11. Develop and refine communication skills.</td>
<td>c,d</td>
<td>c,d</td>
<td>c,d</td>
<td>c,d</td>
<td>c,d</td>
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<td>12. Work in multi-disciplinary and diverse teams.</td>
<td>c,d,e</td>
<td>c,d,e</td>
<td>c,d,e</td>
<td>c,d,e</td>
<td>c,d,e</td>
<td>c,d,e</td>
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<td>13. Participate in professional groups and activities.</td>
<td>c,d,e</td>
<td>c,d,e</td>
<td>c,d,e</td>
<td>c,d,e</td>
<td>c,d,e</td>
<td>c,d,e</td>
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<tr>
<td>14. Learn and demonstrate leadership skills.</td>
<td>c</td>
<td>c</td>
<td>c</td>
<td>c</td>
<td>c</td>
<td>c</td>
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<td>15. Demonstrate standards of ethical conduct which adhere to the Code of Ethics and Professional Responsibility developed by the Certified Financial Planner Board of Standards</td>
<td>a,b,c,d,e K,S</td>
<td>c</td>
<td>c</td>
<td>c</td>
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<td>c</td>
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<tr>
<td>16. Obtain an understanding of 21st Century technologies.</td>
<td>a,b,c,d</td>
<td>a,b,c,d</td>
<td>a,b,c,d</td>
<td>a,b,c,d</td>
<td>a,b,c,d</td>
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### University Student Learning Outcomes

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<tr>
<td>1. Knowledge</td>
<td>c,d,e S</td>
<td>c,d,e S</td>
<td>c,d,e S</td>
<td>c,d,e S</td>
<td>c,d,e S</td>
<td>c,d,e S</td>
</tr>
<tr>
<td>2. Skills</td>
<td>a,b,c,d,e K,S</td>
<td>a,b,c,d,e K,S</td>
<td>a,b,c,d,e K,S</td>
<td>a,b,c,d,e K,S</td>
<td>a,b,c,d,e K,S</td>
<td>a,b,c,d,e K,S</td>
</tr>
<tr>
<td>3. Attitudes and Professional Conduct</td>
<td>a,b,c,d,e K,S</td>
<td>c</td>
<td>c</td>
<td>c</td>
<td>c</td>
<td>c</td>
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