

OFFICE OF THE FACULTY COUNCIL CHANGE TO EXISTING DEGREE or CERTIFICATE PROPOSAL FORM

Faculty-level Curriculum Committee Submission Deadlines & Details

Fall Winter 2018-19, Summer 2019 Academic Sessions

June 1, 2017 Complete proposal package for all proposal types

October 15, 2017 Complete proposal package for New Course proposals and Changes to Existing Courses

Early submissions are welcome and appreciated. Incomplete and late proposals may not be processed in time for the requested academic session.

Proposal packages include the proposal form, a library statement, and consultation form (if applicable).

New: Submit your proposal using the new [online submission form](#).

NOTE: A Change to Existing Degree/Certificate proposal is required if a new course is to be coded as a program requirement in the course repository and included in as a Degree Requirement in the official undergraduate Academic Calendar.

Prior to completing this form, proponents are asked to consult Brittany Tuer, Assistant Director, Academic Standards and Policy Advisor, btuer@yorku.ca, for definitions of major versus minor modifications.

Completed Submission Deadline: 5/26/2017

Department:	<input type="text" value="Administrative Studies"/>	Contact:	<input type="text" value="Marcela Porporato"/>
Degree/Certificate Title:	<input type="text" value="Professional Certificate in Financial Planning"/>		
Stream (if applicable):	<input type="text"/>		
Effective Session for Change:	Term: (e.g., Fall; Winter; Summer)	<input type="text" value="Fall"/>	Year: <input type="text" value="2018"/>

Minor Change Description: (e.g. what is the change requested, what does this change mean for the degree, certificate, etc.):

To include a new elective course that have been recently created: AP//ADMS4508
AP/ADMS4508 Money behaviours and client communication

Academic Rationale for Change:

The course covers topics that are relevant for professionals in the Finance field as determined by professional associations; therefore students need to be aware that this is a new options suitable for their professional certificate.

AP/ADMS4508 Money behaviours and client communication

The topics in this course have been identified by the Financial Planning Standard Council, the certifying body of the CFP® designation, and will be required as core competencies and assess on the certifying exam. Aside from preparing students to pass an exam, professional in the field have identified the skills covered in this class – like client communication, professional writing, and understanding client financial behaviours – as lacking in new financial planners.

Please note: the Committee on Curriculum, Curricular Policy and Standards requires that degree or certificate requirements, as listed in the Undergraduate Calendar ([click here](#)), be included below in their entirety.

*Please denote additions in **bold, blue, underlining**, and ~~strikethrough~~ for deletions.*

Existing Calendar Copy (Change From):	Proposed Calendar Copy (Change To):
<p>Example: Delete this text.</p> <p>Current text – Downloaded from http://calendars.students.yorku.ca/2017-2018/certificate-financial-planning on May 26th at 10m</p> <p>Professional Certificate in Financial Planning Faculty of Liberal Arts & Professional Studies</p> <p>Prior to beginning the certificate, students must have:</p> <p>successfully completed MHF4U (Advanced Functions) or equivalent and obtained a minimum grade of C (4.00) in each of AP/ECON 1000 Introduction to Microeconomics and AP/ECON 1010 Introduction to Macroeconomics or their equivalent.</p> <p>Graduating with a certificate: except where otherwise stated, a minimum cumulative grade point average of 4.00 is required to satisfy certificate requirements. Students must also submit application to graduate from a certificate</p>	<p>Example: Add this text.</p> <p>Professional Certificate in Financial Planning Faculty of Liberal Arts & Professional Studies</p> <p>Prior to beginning the certificate, students must have:</p> <p>successfully completed MHF4U (Advanced Functions) or equivalent and obtained a minimum grade of C (4.00) in each of AP/ECON 1000 Introduction to Microeconomics and AP/ECON 1010 Introduction to Macroeconomics or their equivalent.</p> <p>Graduating with a certificate: except where otherwise stated, a minimum cumulative grade point average of 4.00 is required to satisfy certificate requirements. Students must also submit application to graduate from a certificate</p>

program. Applications should be obtained from and filed with the unit administering the certificate program. Transcript notation that the requirements for a certificate have been completed will be made once the Registrar's Office has received notice from the unit administering the program. Certificates will not be conferred until candidates have successfully completed an undergraduate degree program if they are simultaneously enrolled in a degree and a certificate program. The Faculty does not award certificates retroactively. Refer to the Academic Standards section for details of the undergraduate certificate minimum standards.

Note: The prerequisite of AP/ADMS 3330 for AP/ADMS 4501 is waived for students in the certificate program.

Requirements

Students must complete 39 credits including:

CORE REQUIREMENTS

AP/ADMS 1000 3.00
AP/ADMS 2320 3.00
AP/ADMS 2500 3.00
AP/ADMS 2610 3.00
AP/ADMS 3520 3.00*
AP/ADMS 3530 3.00
AP/ADMS 3531 3.00
AP/ADMS 3541 3.00
AP/ADMS 4501 3.00
AP/ADMS 4505 3.00
AP/ADMS 4506 3.00
AP/ADMS 4507 3.00
AP/ADMS 4561 3.00

*Students who completed ADMS 4561 before ADMS 3520 was introduced into the program must replace ADMS 3520 with another course from the following list. A student who has not taken ADMS 4562 is advised to use it as the replacement, but is not required to do so.

In order to obtain a professional certificate offered through School of Administrative Studies, at least 18 of the ADMS course credits that satisfy certificate requirements must be in addition to those used to satisfy the

program. Applications should be obtained from and filed with the unit administering the certificate program. Transcript notation that the requirements for a certificate have been completed will be made once the Registrar's Office has received notice from the unit administering the program. Certificates will not be conferred until candidates have successfully completed an undergraduate degree program if they are simultaneously enrolled in a degree and a certificate program. The Faculty does not award certificates retroactively. Refer to the Academic Standards section for details of the undergraduate certificate minimum standards.

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In order to obtain a professional certificate offered through School of Administrative Studies, at least 18 of the ADMS course credits that satisfy certificate requirements must be in addition to those used to satisfy the

requirements of a degree. Students may acquire more than one certificate provided at least 18 credits in each certificate are unique to the specific certificate.

Note: to complete the 18 unique credit requirements for the Financial Planning certificate, a student may need three or more additional credits which must be chosen from the following list of course options:

- AP/ADMS 4502 3.00
- AP/ADMS 4503 3.00
- AP/ADMS 4504 3.00
- AP/ADMS 4535 3.00
- AP/ADMS 4536 3.00
- AP/ADMS 4540 3.00
- AP/ADMS 4562 3.00

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Note: to complete the 18 unique credit requirements for the Financial Planning certificate, a student may need three or more additional credits which must be chosen from the following list of course options:

- AP/ADMS 4502 3.00
- AP/ADMS 4503 3.00
- AP/ADMS 4504 3.00
- AP/ADMS 4508 3.00
- AP/ADMS 4535 3.00
- AP/ADMS 4536 3.00
- AP/ADMS 4540 3.00
- AP/ADMS 4562 3.00

Program Learning Outcomes:

Addition/ Removal of Courses

Please describe how each course being added or removed will contribute to the program learning outcomes. *Please note: Proponents are asked to specifically make reference to the Degree-Level Expectations for the program/degree when completing this section.*

Course Number and Title	Add or Remove the course from the program?	Is the course <u>Required</u> or <u>Optional</u>?	How will this course contribute to the program learning outcomes?
	Choose an item.		
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Confirmation of Consultation/Approval:

The Committee on Curriculum, Curricular Policy and Standards will not consider proposals that have not been approved by the Department/School responsible for offering the course.

Please ensure that all fields are filled below, and that appropriate consultation/approval documentation is attached.

Has consultation been completed? (please check) **Yes** **Not applicable**

Is evidence of consultation attached? (please check) **Yes** **Not applicable**

Departmental Curriculum Approval:

Click here to enter text.

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Name

Position

Date

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