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)

Degree Student Learning Outcomes	FSHS 624	FSHS 760	FSHS 762	FSHS 764	FSHS 766	FSHS 772
1. Understand the fundamentals of the financial planning process.	a,b,c,d K,S	a,b,c,d K,S	a,b,c,d K,S	a,b,c,d K,S	a,b,c,d K,S	a,b,c,d K,S
2. Calculate and interpret the time value of money.	a,b,c,d K,S	a,b K,S	a,b K,S	a,b K,S	a,b K,S	a,b K,S
3. Develop a clear professional understanding of insurance policies and strategies.	a,b,c,d K,S	a,b K,S	a,b K,S	a,b K,S	a,b,c,d,e K,S	a,b K,S
4. Understand risk management concepts.	a,b,c,d K,S	a,b K,S	a,b K,S	a,b K,S	a,b,c,d,e K,S	a,b K,S
5. Apply tax planning strategies to meet the goals of the client.	a,b,c,d K,S	a,b K,S	a,b K,S	a,b K,S	a,b K,S	a,b,c,d,e K,S
6. Become skilled in applying retirement planning strategies.	a,b,c,d K,S	a,b,c,d,e K,S	a,b K,S	a,b K,S	a,b K,S	a,b K,S
7. Develop estate planning strategies for the benefit of clients.	a,b,c,d K,S	a,b K,S	a,b K,S	a,b,c,d,e K,S	a,b K,S	a,b K,S
8. Develop investment planning strategies to assist clients in meeting financial goals.	a,b,c,d K,S	a,b,c,d K,S	a,b,c,d K,S	a,b,c,d K,S	a,b,c,d K,S	a,b,c,d K,S
9. Apply knowledge to help others meet challenges.	c,d,e, S	c,d,e, S	c,d,e, S	c,d,e, S	c,d,e, S	c,d,e, S
10. Solve real world problems.	a,b,c,d,e, K,S	a,b,c,d,e, K,S	a,b,c,d,e, K,S	a,b,c,d,e, K,S	a,b,c,d,e, K,S	a,b,c,d,e, K,S
11. Develop and refine communication skills.	c,d	c,d	c,d	c,d	c,d	c,d
12. Work in multi-disciplinary and diverse teams.	c,d,e	c,d,e	c,d,e	c,d,e	c,d,e	c,d,e
13. Participate in professional groups and activities.	c,d,e	c,d,e	c,d,e	c,d,e	c,d,e	c,d,e
14. Learn and demonstrate leadership skills.	c	c	c	c	c	c
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	a,b,c,d,e K,S	c	c	c	c	c
16. Obtain an understanding of 21st Century technologies.	a,b,c,d	a,b,c,d	a,b,c,d	a,b,c,d	a,b,c,d	A,b,c,d
University Student Learning Outcomes						
1. Knowledge	c,d,e, S	c,d,e, S	c,d,e, S	c,d,e, S	c,d,e, S	c,d,e, S
2. Skills	a,b,c,d,e, K,S	a,b,c,d,e, K,S	a,b,c,d,e, K,S	a,b,c,d,e, K,S	a,b,c,d,e, K,S	a,b,c,d,e, K,S
3. Attitudes and Professional Conduct	a,b,c,d,e K,S	c	c	c	c	c