

Business Administration

Course Number:	BUAD 235
Course Title:	INSURANCE AND ESTATE PLANNING
Credits:	3
Calendar Description:	Learners examine the issues related to risk management and estate planning. Topics include risk management and insurance needs analysis, the steps in the risk management process, products, issues and practices in the areas of insurance. Components of estate planning include wills and probate, powers of attorney, testamentary and inter vivo trusts, and estate freezes.
Semester and Year:	Winter 201 9
Prerequisite(s):	BUAD 251; MATH 114
Corequisite(s):	No
Prerequisite to:	No
Final Exam:	Yes
Hours per week:	3
Graduation Requirement:	Required Financial Services optin491.23 Tm0L G[.] -2ET@210.77

Course Schedule

Week of:			
		Monday, Jan 7 - Classes Start Monday, Feb 18 Family Day (no classes) Tuesday, Feb 19 to Friday, Feb 22 Reading Week (no classes) Friday, Apr 12 Last Day of Regular Classes	
Jan	7	Introduction Insurance Fundamentals	Mod. 17
	14	The Risk Management Process Property and Casualty Insurance	Mod. 17
	21	Government and Private Medical Individual Insurance Contracts	Mod. 17 Mod. 18
	28	Temporary Life Insurance Whole Life Insurance	Mod. 18
Feb	4	Universal Life Insurance Income Tax Implications	Mod. 18
	11	Review Mid-term Exam (Wed Feb 13)	Mod. 18
	18	READING BREAK (no classes)	Mod. 18
	25	Case study: Life Insurance Needs Analysis Life Insurance applications	Mod. 18
Mar	4	Group Life, Disability, Long-Term Care and CCI	Mod. 18
	11	POA, Estate & Wills	Mod. 19
	18	Intestate Rules and Probate	Mod. 19
	25	Will Substitutes Executor process	Mod. 19
Apr	1	Taxation / Charitable Giving Trusts	Mod. 19
	8	Trusts Review	Mod. 19
	15-29	Final Exam Period	

SKILLS ACROSS THE BUSINESS CURRICULUM

The Okanagan School of Business promotes core skills across the curriculum. These skills include reading, written and oral communications, computers, small business, and academic standards of ethics, honesty and integrity.

STUDENT CONDUCT AND ACADEMIC HONESTY

What is the Disruption of Instructional Activities?

At Okanagan College (OC), disruption of instructional activities

examinations, lectures, seminars, tutorials, group meetings, other related activities, and with students using the study
ation, harassment and fraud. Penalties

for disruption of instructional activities include a range of sanctions from a warning and/or a failing grade on an assignment,
examination or course to suspension from OC.

What is Cheating?

not limited to dishonest or attempted dishonest conduct during tests or examinations in which the
use is made of books, notes, diagrams or other aids excluding those authorized by the examiner. It includes communicating
with others for the purpose of obtaining information, copying from the work of others and purposely exposing or conveying

Students must submit independently written work. Students may not write joint or collaborative as