

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 attorn



Course Schedule

2023 Week of			
		Monday January 9th, First day of class Monday February 20th, Statutory Holiday (no classes) February 21st thru 24th, Reading Week (no classes) Friday April 7th and Monday April 10th, Statutory Holidays (no classes) Friday April 14th, Last day of class	
Jan	9	Introduction / CFP Pathway Insurance Fundamentals	Course FP921
	16	The Risk Management Process Property and Casualty Insurance	Course FP921
	23	Government and Private Medical Individual Insurance Contracts	Course FP921
	30	Temporary Life Insurance Whole Life Insurance	Course FP921
Feb	6	Universal Life Insurance Income Tax Implications	Course FP921
	13	Income Tax Implications MID-TERM EXAM (Wednesday February 15)	

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 includes student “conduct which interferes with examinations, lectures, seminars, tutorials, group meetings, other related activities, and with students using the study facilities of OC”, as well as conduct that leads to property damage, assault, discrimination, 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?

“Cheating includes but is 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 information to other students who are taking the test or examination.”

Students must submit independently written work. Students may not write joint or collaborative assignments with other students unless the instructor approves it in advance as a group/team project. Students who share their work with other students are equally involved in cheating.

What is Plagiarism?

Plagiarism is defined as “the presentation of another person’s work or ideas without proper or complete acknowledgement.” It is the serious academic offence of reproducing someone else’s work, including words, ideas and media, without permission for course credit towards a certificate, diploma, degree and/or professional designation. The defining characteristic is that the work is not yours.

“Intentional plagiarism is the deliberate presentation of another’s work or ideas as one’s own.” Intentional plagiarism can be a copy of material from a journal article, a book chapter, data from the Internet, another student, work submitted for credit in another course or from other sources.

“Unintentional plagiarism is the inadvertent presentation of another’s work or ideas without proper acknowledgement because of poor or inadequate practices. Unintentional plagiarism is a failure of scholarship; intentional plagiarism is an act of deceit.”

Plagiarism?

Students have a responsibility to read the OC Plagiarism Policy and Procedures outlined in the OC calendar, which is available in online format www.okanagan.bc.ca. Students must acknowledge the sources of information used on all their assignments. This usually involves putting the authors’ name and the year of publication in parentheses after the sentence in which you used the material, then at the end of your paper, writing out the complete references in a Reference section.

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