

STELLA MARIS COLLEGE (AUTONOMOUS), CHENNAI

Course Schedule: November 2024 – April 2025

Department : **Commerce (Accounting and Finance)**
Name/s of the Faculty : **Ms. Divya S**
Course Title : **Personal Financial Planning**
Course Code : **19AF/GE/PF22**
Shift : **II**

Week & No. of hours	Units & Topics	Teaching Methodology	Text & References	Method of Evaluation
Nov 18 – 25, 2024 (Day Order 1-6)	UNIT-1 1.1 Meaning and Importance 1.2 Personal Financial Goals and Life Cycle Approach	Lecture	J.R.Kapoor, Dlabay and R Hughes – <i>Personal Finance</i> ; Jeff Madura – <i>Personal Finance</i>	Quiz/ Classroom Discussion
Nov 26- Dec 3, 2024 (Day Order 1 to 6)	1.2 Personal Financial Goals and Life Cycle Approach 1.3 Elements and Structure of Personal Financial Plan	Lecture	<i>J.R.Kapoor, Dlabay and R Hughes – Personal Finance</i> ; <i>Jeff Madura – Personal Finance</i>	Quiz/ Classroom Discussion
Dec 4-11, 2024 (Day Order 1 to 6)	1.3 Elements and Structure of Personal Financial Plan 1.4 Process of Personal Financial Planning	Lecture	<i>J.R.Kapoor, Dlabay and R Hughes – Personal Finance</i> ; <i>Jeff Madura – Personal Finance</i>	Quiz/ Classroom Discussion
Dec 12-19, 2024 (Day Order 1 to 6)	1.4 Process of Personal Financial Planning	Lecture	<i>J.R.Kapoor, Dlabay and R Hughes – Personal Finance</i> ; <i>Jeff Madura – Personal Finance</i>	Quiz/ Classroom Discussion
Dec 20, 2024 (Day Order 1)	UNIT-II 2.1 General Principles of Monetary Management	Lecture	<i>J.R.Kapoor, Dlabay and R Hughes – Personal Finance</i> ; <i>Jeff Madura – Personal Finance</i>	Assignment

Jan 3 – 7, 2025 (Day Order 3 to 6)	2.1 General Principles of Monetary Management	Lecture	<i>J.R.Kapoor, Dlabay and R Hughes – Personal Finance; Jeff Madura – Personal Finance</i>	Assignment
Jan 8 – 17, 2024 (Day Order 1 to 6)	2.2 Process of Cash Flow Planning and Budgeting	Lecture	<i>J.R.Kapoor, Dlabay and R Hughes – Personal Finance; Jeff Madura – Personal Finance</i>	Assignment
Jan 18 - 23, 2025	C.A. Test – I			
Jan 24 - 30, 2025 (Day Order 1 to 6)	2.3 Tax Implications on Financial Planning	Lecture	<i>J.R.Kapoor, Dlabay and R Hughes – Personal Finance; Jeff Madura – Personal Finance</i>	Assignment
Feb 3-8, 2025 (Day Order 1 to 6)	2.3 Tax Implications on Financial Planning	Lecture	<i>J.R.Kapoor, Dlabay and R Hughes – Personal Finance; Jeff Madura – Personal Finance</i>	Assignment
Feb 10– 18, 2025 (Day Order 1 to 4)	UNIT-III 3.1 Individual Risk Assessment	Lecture	<i>J.R.Kapoor, Dlabay and R Hughes – Personal Finance; Jeff Madura – Personal Finance</i>	Quiz/ Classroom Discussion
Feb 19- 26, 2025 (Day Order 1-6)	UNIT-III 3.1 Individual Risk Assessment	Lecture	<i>J.R.Kapoor, Dlabay and R Hughes – Personal Finance; Jeff Madura – Personal Finance</i>	Quiz/ Classroom Discussion

Feb 27- Mar 6, 2025 (Day Order 1 to 6)	3.1 Individual Risk Assessment	Lecture	J.R.Kapoor, Dlabay and R Hughes – <i>Personal Finance</i> ; Jeff Madura – <i>Personal Finance</i>	Quiz/ Classroom Discussion
Mar 7 – 11, 2025 (Day Order 1 to 3)	3.2 Needs and Benefits of Investing	Lecture	<i>J.R.Kapoor, Dlabay and R Hughes – Personal Finance</i> ; <i>Jeff Madura – Personal Finance</i>	Quiz/ Classroom Discussion
Mar 12 –17, 2025	C.A. Test – II			
Mar 18 – 20, 2025 (Day 4 to 6)	3.2 Needs and Benefits of Investing	Lecture	<i>J.R.Kapoor, Dlabay and R Hughes – Personal Finance</i> ; <i>Jeff Madura – Personal Finance</i>	Quiz/ Classroom Discussion
Mar 21 - 28, 2025 (Day Order 1 to 6)	3.3 Investment Options for Individual Investors – Shares, Bonds, Mutual Funds, Real Estate, Fixed Deposits, PPF, NPS, Gold and Bullion Investments	Lecture	<i>J.R.Kapoor, Dlabay and R Hughes – Personal Finance</i> ; <i>Jeff Madura – Personal Finance</i>	Quiz/ Classroom Discussion
Mar 29- April 3, 2025 (Day Order 1 to 3)	3.3 Investment Options for Individual Investors – Shares, Bonds, Mutual Funds, Real Estate, Fixed Deposits, PPF, NPS, Gold and Bullion Investments	Lecture	<i>J.R.Kapoor, Dlabay and R Hughes – Personal Finance</i> ; <i>Jeff Madura – Personal Finance</i>	Quiz/ Classroom Discussion
	REVISION			

Other Component:

- Presentation on the topic – Investment Opportunities available for Individuals and its tax implications – 25 marks – March 7, 2025 onwards.

