

Achieve Financial Success!

# Introduction to Personal Finance

## Financial Planning Course (UNIV102)

### Learn Financial Planning & Literacy!

Every financial decision we make impacts our lives. Introduction to Personal Finance: **Beginning Your Financial Journey** is designed to help students avoid early financial mistakes and provide the tools needed to secure a strong foundation for the future. This course empowers students to define their personal values and make smart financial decisions that help them achieve their goals.



### Intro to Personal Finance is ideal for both Business & Non-Business majors.

This **1-unit course** starts students on a financial journey, composing of four sections designed to prepare students to earn and spend money throughout life. Perfect for students who need one unit to graduate or just want to gain financial planning & literacy skills. Prerequisite: None.



### What you'll study:

- Section 1: *Introduction & Tools* to embark on your financial journey.
- Section 2: Building foundations for the financial journey such as earnings, tax, credit scores, checking & savings accounts, loans, housing decisions.
- Section 3: Investment & Risk Management
- Section 4: Financial Plan Development (building a financial plan).

### Open to all majors!

- No prerequisite.

### Course enrollment details:

- Professor: **Bill Klepper**
- Class Date & Time: **T 11:25am-12:15pm**
- Class Location: **Peters Hall 104**
- Course Section/Course #: **UNIV102-01**



For more information visit

<https://www.callutheran.edu/academics/minors/financial-planning> or contact:

**Chia-Li Chien**, PhD, CFP, PMP, Program Director,  
Financial Planning  
(805) 493-3410, [chialichien@callutheran.edu](mailto:chialichien@callutheran.edu)

School of  
Management

California  
Lutheran  
University