

# California Lutheran University

## School of Management

Financial Planning

### MBA/MS & Certificate in Financial Planning Academic Year 2021-2022

This schedule is subject to change. Live-Chat session days, times, and instructors are tentative until posted in Web Advisor for registration.

#### Term 1, 2021 -August 9,2021 to October 1,2021 (21/OM/1)

Course #	Course Title	Faculty (all class held from 5:30 to 7:00 pm)	Day
MFP521	Introduction to Financial Planning	Chia-Li Chien, PhD, CFP, PMP	Monday
MFP526	Risk Management and Insurance	Kimberly Turner Ph.D., MSFS, CFP, ChFC,CLU,AEO,CAP	Tuesday
MFP509	Marketing Management	Jeff Lang Ph.D., Candidate, MS, CFP,ChFC,CLU	Wednesday
MFP535	Psychological-Cultural Dynamics of Communication and Persuasion	Daralee Barbera EdD, CFP, CLF, ChFC, CMFC, CPBC	Thursday

#### Term 2, 2021- October 11,2021to December 3,2021(21/OM/2):

MFP513	Financial Principles & Policies	Hossein Salehi Ph.D., CFP	Wednesday
MFP525	Emp. Benefit and Retirement Planning	Chia-Li Chien, PhD, CFP, PMP	Monday
MFP510	Strategic Decision Making	Kirk Lesh Ph.D.	Wednesday
MFP536	Social Psychology of Leading Clients	Daralee Barbera EdD, CFP, CLF, ChFC, CMFC, CPBC	Thursday

#### Term 3, 2022- January 3,2022 to February 25,2022 (22/OM/3)

MFP522	Tax Management and Strategy (Section 1)	Hratch Karakachian, J.D., MBT, CPA	Thursday
MFP511A	Macro Economics for Investments	Cancelled	
MFP522	Tax Management and Strategy (Section 2)	Colleen Carcone J.D.	Tuesday
MFP506	FinTech	Jeff Lang Ph.D., Candidate, MS, CFP,ChFC,CLU	Wednesday
MFP530	International Estate Planning	Cancelled	
MFP597	Applied research in Financial Planning	Hossein Salehi Ph.D., CFP	Wednesday
MFP545	Behavioral Finance (Section 1)	Chai-Li Chien, PhD, CFP, PMP	Monday
MFP545	Behavioral Finance (Section 2)	Rebecca Stay MSFS,P h.D. Candidate, CFP	Monday

#### Term 4,2022- March 7, 2022 to April 29,2022(22/OM/4)

MFP542	Investment and Portfolio	Jeremy Witbeck MBA,CFA,CFP	Wednesday
MFP527	Principles of Estate Planning	Colleen Carcone J.D.	Tuesday
MFP534	Financial Planning for Small and Family Businesses	Chia-Li Chien, PhD, CFP, PMP	Monday
MFP541	Strategic Financial Analysis	Cancelled	
MFP539	Practice Management	Daralee Barbera EdD, CFP, CLF, ChFC, CMFC,CPBC	Thursday

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**Term 5, 2022- May 23,2022 to July 12,2022( 22/OM/5)**

Course #	Course Title	Faculty (all class held from 5:30 to 7:00 pm)	Day
MFP505	Enterprise Organizational Strategy	Cancelled	
MFP598	Capstone Course in Financial Planning (Section 1)	Chia-Li Chien, PhD, CFP, PMP	Monday
MFP598	Capstone Course in Financial Planning (Section 1)	Linda Clayton MBA,CFP,CDFA	Monday
MFP538	Financial Counseling	Saundra Davis, MSFP,APFC, FBS	Tuesday
MFP508	Ethical Behaviors in Financial Planning	Igor Zey, MSFS, CFP, CLU, ChFC, Ph.D. Candidate or Steven Lee Ph.D.	Wednesday
MFP537	Retirement Income Planning	Jeff Lang Ph.D. Candidate, MS, CFP,ChFC,CLU	Thursday