SOUTH DAKOTA BOARD OF REGENTS
ACADEMIC AFFAIRS FORMS

Revised Course Request: Unique Course
(Substantive Modification)

Use this form to request a substantive change to an existing unique course. Consult the system course database for information about existing courses. If the course revision is for an approved General Education course, please see the Revision to General Education Requirements Form. Signatures are required on the final form submitted to the Academic Affairs Council (AAC).

NSU	Sal Villegas	Kristi Bockorny	4/3/2025
Institution	**Form Initiator**	**Dean's Approval Signature**	**Date**
Choose an item.	Accounting/Banking & Fin Serv/Finance	Michael Wanous	5/8/2025
Institution	**Division/Department**	**Institutional Approval Signature**	**Date**

Section 1. Existing Course Title and Description

If changing from a course that previously had only a lecture or laboratory component to a composite course, identify both the course and laboratory numbers (xxx and xxxL) and credit hours associated with each. Provide the complete course description as it appears in the system course database including pre-requisites, co-requisites, and registration restrictions.

Prefix & No.	Course Title	Credits
BFS 771	Financial Planning	3

Course Description
Covers personal finance, including meeting long-term goals and objectives through effective accumulation and distribution of wealth; life, disability, liability and long-term care insurance; retirement and estate planning; and, ethics, in preparation for the national Certified Financial Trust Advisor (CFTA) exam and certificate.

Section 2. Modification(s) Requested

2.1. This modification will include (*place an "X" in the box for all that apply*):

☒ **A change in description/subject matter content (enter revised description below).**

This course provides an in-depth exploration of financial planning principles, strategies, and applications. Students will learn how to assess clients' financial situations, develop comprehensive financial plans, and apply wealth management techniques. Topics include retirement planning, investment strategies, risk management, tax optimization, estate planning, and ethical decision- making in financial advising.

Note: Course descriptions are short, concise summaries that typically do not exceed 75 words. DO: Address the content of the course and write descriptions using active verbs (e.g., explore, learn, develop, etc.). DO NOT: Repeat *the title of the course, layout the syllabus, use pronouns such as "we" and "you," or rely on specialized jargon, vague phrases, or clichés.*

	Current		**New**
☐ **Change in instructional method**	________________	to	________________

☐ **Addition/deletion of a lab/lecture component (*explain below*)**

If the addition of a lab/lecture component requires a change in pre-requisites or co-requisites, indicate below (add lines as needed, make sure to copy and paste formatting)

Prefix & No.	Course Title	Pre-Req/Co-Req?
		Choose an item.

Will the grade for this lab/lecture component be limited to S/U (pass/fail)?

☐ Yes ☐ No

Will section enrollment for the lab/lecture component be capped?

☐ Yes, max per section: __________ ☐ No

☐ **Change to existing unique course:**

Prefix & No.	Course Title	Credits

NOTE: Use the Authority to Offer an Existing Course Form to request authorization to offer an existing common or unique course.

Effective term of the change: Fall 2025

☐ **Explain any additional minor changes proposed at this time below (if needed):**

2.2. Add justification for all changes noted above:

Our Banking and Financial services program is independent of the American Banking Association's Certified Financial Trust Advisor (CFTA) exam and certificate.

Section 3. Other Course Information

3.1. Will this course equate (i.e., be considered the same course for degree completion) with any other unique or common courses in the common course database?

☐ Yes ☒ No

If yes, indicate the course(s) to which the course will equate (add lines as needed):

Prefix & No.	**Course Title**

Section 4. Department and Course Codes (Completed by University Academic Affairs)

	Current		**New**
☐ **Change in University Department Code**	________________	to	________________
☐ **Change in Banner Department Code**	________________	to	________________
☐ **Change in CIP Code**	________________	to	________________