



A POLYTECHNIC INSTITUTION

School of Business

Program: Financial Management

Option: Financial Planning

Course Number: FMGT 4535

Course Name: Financial Services Marketing

Start Date: March 17, 2008

End Date: May 23, 2008

Total Hours: 40 **Total Weeks:** 10

Term/Level: 4B **Course Credits:** 2.5

Hours/Week: 4 **Lecture:** 2 **Lab:** 2

Prerequisites

Course Number: FMGT 4535 is a Prerequisite for:

Course No. Course Name

Course No. Course Name

FMGT 3610 Security Analysis

v Course Description

This course provides the financial planning student with the marketing, sales and communications skills essential to success in the financial planning profession. The course covers the marketing and sales of financial planning products and services and, in addition, it will introduce the student to the institutional environment in which many financial planners operate.

v Detailed Course Description

The goal of this course is for the financial planning student to gain basic professional selling skills with a major focus on relationship selling skills for the Financial Planning Industry.

v Evaluation

Midterm Exam	25%
Final Exam	25%
Group Financial Planning Presentation	15%
In Lab Sales Presentations	20%
Course Participation and Attendance	15%
TOTAL	100%

NOTE: Failure to achieve 50% or more on the combination of the exams (midterm and final), will require 0 % being assigned for all other group projects and assignments, resulting in a failing grade for this course.

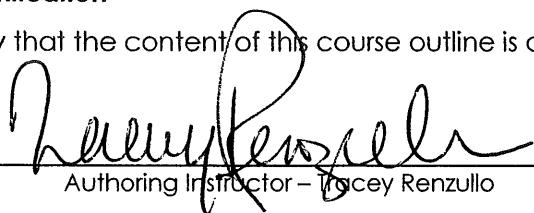
v Course Learning Outcomes/Competencies

Upon successful completion, the student will be able to:

1. Understand the concept of relationship selling
2. Explain the steps in the relationship selling process
3. Plan for, develop and deliver a sales presentation
4. Critique a videotape of their own sales presentation
5. Understand the techniques available for maintaining and building client relationships
6. Demonstrate effective verbal, non-verbal and written communication skills
7. Understand the current trends and practices in financial services direct and interactive marketing

v Verification

I verify that the content of this course outline is current.

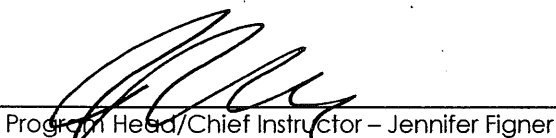


Authoring Instructor – Tracey Renzullo



Date

I verify that this course outline has been reviewed.



Program Head/Chief Instructor – Jennifer Figner



Date

I verify that this course outline complies with BCIT policy.



Dean/Associate Dean – Barry Hogan



Date

Note: Should changes be required to the content of this course outline, students will be given reasonable notice.

v **Instructor(s)**

Tracey Renzullo

Office: SE6 - 310 Phone: 604-451-7033
Office Hrs.: As posted E-mail: tracey_renzullo@bcit.ca

v **Learning Resources**

Required:

- ABC's of Relationship Selling through Service, Charles M. Futrell and Mark Valvasori, Third Canadian Edition, ISBN: 0-07-095187-X

v **Information for Students**

Assignments: Late assignments, lab reports or projects will **not** be accepted for marking. Assignments must be done on an individual basis unless otherwise specified by the instructor.

Makeup Tests, Exams or Quizzes: There will be **no** makeup tests, exams or quizzes. If you miss a test, exam or quiz, you will receive zero marks. Exceptions may be made for **documented** medical reasons or extenuating circumstances. In such a case, it is the responsibility of the student to inform the instructor **immediately**.

Ethics: BCIT assumes that all students attending the Institute will follow a high standard of ethics. Incidents of cheating or plagiarism may, therefore, result in a grade of zero for the assignment, quiz, test, exam, or project for all parties involved and/or expulsion from the course.

Attendance: The attendance policy as outlined in the current BCIT Calendar will be enforced. Attendance will be taken at the beginning of each session. Students not present at that time will be recorded as absent. **Missing more than 10% of classes without prior arrangement and consent of your instructor may result in a grade of 0% being assigned for your final exam, equating to a failing grade for this course.**

Illness: A doctor's note is required for any illness causing you to miss assignments, quizzes, tests, projects, or exam. At the discretion of the instructor, you may complete the work missed or have the work prorated.

Attempts: Students must successfully complete a course within a maximum of three attempts at the course. Students with two attempts in a single course will be allowed to repeat the course only upon special written permission from the Associate Dean. Students who have not successfully completed a course within three attempts will not be eligible to graduate from the appropriate program.

Course Outline Changes: The material or schedule specified in this course outline may be changed by the instructor. If changes are required, they will be announced in class.

v **Assignment Details**

Details for your Sales Presentation Assignment will be provided in-class.

The Group Presentations will take place on May 7th, 2008. Your group will be presenting the Financial Plan you developed for FMGT 4525 taught by Larry Stubbs. This presentation is worth 15% of your final grade. You will be given an opportunity to practice this in lab the week prior to your presentation taking place.

Schedule

Dates	Outcome/Material Covered	Labs	Reading/ Important Dates
1 March 17-21	LEC: Course Overview, Introduction to Selling as a Profession, Ethical Issues	LAB: Introduction, Product Selections for Role Plays, Introductions, Begin Role Plays	Chapters 1, 2
2 March 24-28	LEC: The Relationship Selling Process – The Approach and Needs Analysis	LAB: Role Play – The Approach and Needs Analysis	Chapter 8 March 28 th – External Exam
3 March 31-April 4	LEC: The Presentation, FABs – Features, Advantages and Benefits, Trial Closes	LAB: Role play – The Presentation, FABs, Trial Closes	Chapter 9 Labs will be videotaped.
4 April 7-11	LEC: The Relationship Selling Process – Handling Objections and Closing	LAB: Handling Objections and Closing	Chapters 10, 11
5 April 14-18	Midterm Exam – All material covered in lectures and labs		Midterm
6 April 21-25	LEC: Preparation for Relationship Selling	LAB: Interview and Presentation Skills/Tips	Chapters 3,4,5
7 April 28-May 2	LEC: The Relationship Selling Process – Prospecting and The Preapproach, RBC Mortgage Example	LAB: Rehearse Financial Planning Presentations	Chapters 6,7
8 May 5-9	LEC: The Relationship Selling Process – Follow-up, Direct Marketing of Financial Services Products	LAB: Sales Presentations	Chapter 12 May 7 th – Group Financial Planning Presentations
9 May 12-16	LEC: Keys to a Successful Selling Career, Review	LAB: Sales Presentations	Chapters 13, 14
10 May 20-23	Final Exam – all material covered in lectures and labs		Final Exam Week

NOTE: The schedule above is tentative and subject to change. Any changes will be announced in lecture and/or lab.