SACRAMENTO STATE

Course Change Proposal
Form A

SACRAMENTO STATE
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OCT 29 2007
ACADEMIC AFFAIRS

Academic Group (*College*): **College of Business Administration**	**Academic Organization** (*Department*): **N/A**	**Date: October 25, 2007**
Type of Course Proposal: New ___ Change __X_ Deletion ___	**Department Chair: N/A**	**Submitted by: Chiang Wang, Associate Dean for Graduate and External Programs**
Does this course fulfill a requirement for single-subject or multiple subject credential students? Yes ___ No _X__	**For Catalog Copy: Yes _X__ No ___** **CCE: Yes _X__ No ___**	**Semester Effective:** **Fall ___ Spring _X__, 2008___**

This course replaces experimental course Subject Area *(prefix)* **and Catalog Number** *(course number)*:	
This Catalog Number *(course number)* **is being replaced:**	

Change from:

Subject Area *(prefix)* **& Catalog No.** *(course no.)*:	**Title:**	**Units**
ACCY 275	**Advanced Estate, Trust and Retirement Planning**	**3**

Change to:

Subject Area *(prefix)* **& Catalog No.** *(course no.)*:	**Title:**	**Units:**
ACCY 275	**International Wealth and Asset Management**	**3**

JUSTIFICATION:

This course is no longer necessary in its current form. The current course content may now be incorporated into ACCY 274 - Estate, Gift and Trust Taxation. This is due to recent changes in the federal tax laws which have resulted in a shift in emphasis to income tax. ACCY 275 will focus its emphasis on the international aspects of estate and gift tax issues to make it more relevant to a global environment.

NEW COURSE DESCRIPTION: (Not to exceed 80 words, and language should conform to catalog copy. See http://www.csus.edu/acaf/univmanual/crspsl.htm - Guidelines for Catalog Course Description

Importance of global asset protection and wealth management; domestic Statutory and case law authorities of selected European, American and Asian countries as they relate to wealth protection and asset management; bi-lateral international agreements relating to wealth management and asset protection; Multilateral agreement affecting wealth management and asset protection; tax and legal liability minimizing models.

Note:	
Prerequisite: ACCY 250 or equivalent **Enforced at Registration: Yes___ No_X__**	
Corequisite: **Enforced at Registration: Yes___ No _X__**	
CAN (California Articulation Number):	
Graded: Letter _X____ Credit/No Credit____	**Instructor Approval Required? Yes___ No_X__**
Course Classification *(e.g., lecture, lab, seminar, discussion)*: **Seminar**	**Title for CMS (not more than 30 characters)** **International Wealth Mgmt**
Cross Listed? **Yes ___ No__X__**	**If yes, do they meet together and fulfill the same requirement, and what is the other course.**
How Many Times Can This Course be Taken for Credit? ___1___ **Can the course be taken for Credit more than once during the same term? Yes ___ No _X_**	

FOR NEW COURSE PROPOSALS OR SUBSTANTIVE CHANGES ONLY:

Description of the Expected Learning Outcomes: Describe outcomes using the following format: "Students will be able to: 1), 2), etc." See the example at http://www.csus.edu/acaf/example.htm

At the conclusion of the course, students will be able to:

1. **Describe the global environment of wealth and asset management.**
2. **Discuss comprehensive knowledge in international asset and wealth management through participation in group planning sessions.**
3. **Use, examine, and contrast numerous information sources relating to global wealth management.**

**Attach a list of the required/recommended course readings and activities [Note: it is understood that these are updated and modified as needed by the instructor(s).] This attachment should be forwarded only to your Dean's office, not Academic Affairs.

Assessment Strategies: A description of the assessment strategies (e.g., portfolios, examinations, performances, pre-and post-tests, conferences with students, student papers) which will be used by the instructor to determine the extent to which students have achieved the learning outcomes noted above:

Students will be assessed on their level of class participation and current event presentations. They will be given cases to analyze and present. Students will have periodic quizzes and a final group case project based upon a realistic fact pattern involving individuals and business existing in a global environment.

For whom is this course being developed?
Majors in the Dept ___ Majors of other Depts ___ Minors in the Dept ___ General Education ___ Other _X__
Is this course required in a degree program (major, minor, graduate degree, certificate? Yes __ No _X__
If yes, identify program(s):

Does the proposed change or addition cause a significant increase in the use of College or University resources (lab room, computer facilities, faculty, etc.)? Yes ___ No _X___
If yes, attach a description of resources needed and verify that resources are available.

Indicate which department or programs will be affected by the proposed course (if any). None

The Department Chair's signature below indicates that affected programs have been sent a copy of this proposal form.

Approvals: If proposed change, new course or deletion is approved, sign and date below. If not approved, forward without signing to the next reviewing authority, and attach an explanatory memorandum to the original copy.

Signatures:	Date
Department Chair:	10/25/07
College Dean or Associate Dean:	10/25/07
CPSP ***(for school personnel courses ONLY)***	
Associate Vice President and Dean for Academic Programs	

Distribution: Academic Affairs (original), Department Chair and College Dean. Dean's office to send original after approval to Academic Affairs, at mail zip 6016. An electronic copy must also be sent.

ACCY 275 - International Wealth and Asset Management

Course Outline

Course Description

Importance of global asset protection and wealth management; domestic Statutory and case law authorities of selected European, American and Asian countries as they relate to wealth protection and asset management; bi-lateral international agreements relating to wealth management and asset protection; Multilateral agreement affecting wealth management and asset protection; tax and legal liability minimizing models.

Learning Objectives

At the conclusion of the course, students will be able to:

- Describe the global environment of wealth and asset management.
- Discuss comprehensive knowledge in international asset and wealth management through participation in group planning sessions.
- Use, examine, and contrast numerous information sources relating to global wealth management.

List of Topics

- Domestic Statutory and case law authorities of selected European, American and Asian countries as they relate to wealth protection and asset management.
- Bi-lateral international agreements relating to wealth management and asset protection.
- Multilateral agreement affecting wealth management and asset protection.
- Tax and legal liability minimizing models.

Suggested Textbook

Asset protection: Domestic and International Law and Tactics, Osborne, D., Thompson/West 2007.