### Course Change Proposal

**Form A**

<table>
<thead>
<tr>
<th>Academic Group (College):</th>
<th>Academic Organization (Department): N/A</th>
<th>Date: October 30, 2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>College of Business Administration</td>
<td>Department Chair: N/A</td>
<td>Submitted by: Chiang Wang, Associate Dean for Graduate and External Programs</td>
</tr>
</tbody>
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**Type of Course Proposal:**
- New: __X__ Change: _X_ Deletion: _

**Does this course fulfill a requirement for single-subject or multiple subject credential students?**
- Yes __X__ No _

**For Catalog Copy:**
- Yes __X__ No _

**CCE:**
- Yes __X__ No _

**Semester Effective:**
- Fall __X__ Spring _X__ 2008 _

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

**This Catalog Number (course number) is being replaced:**

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**Change from:**

**Subject Area (prefix) & Catalog No. (course no.):** ACCY 275

**Title:** Advanced Estate, Trust and Retirement Planning

**Units: 3**

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**Change to:**

**Subject Area (prefix) & Catalog No. (course no.):** ACCY 275

**Title:** International Wealth and Asset Management

**Units: 3**

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**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.

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

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.

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**Note:**

Prerequisite: ACCY 250 or equivalent

Enforced at Registration: Yes __X__ No _

Corequisite:

Enforced at Registration: Yes __X__ No _

CAN (California Articulation Number):

Graded: Letter _X__ Credit/No Credit __

Instructor Approval Required? Yes __X__ No _

Course Classification (e.g., lecture, lab, seminar, discussion):

Seminar

Title for CMS (not more than 30 characters)

International Wealth Mgmt

Cross Listed?
- Yes __X__ No _

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 __X__ No _
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/aca/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 _____

Is this course required in a degree program (major, minor, graduate degree, certificate)? Yes _____ No _____

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 _____

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: 10/35/07

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.