

Specialized Transfer Program: Finance & Wealth Management, King's University College at Western and Fanshawe College



Tracy Cunningham, Associate Registrar, King's University College at Western University

Mary Pierce, Chair, Lawrence Kinlin School of Business, Fanshawe College

Minette Klazinga, Pathways Consultant, Lawrence Kinlin School of Business, Fanshawe College

Project Introduction

- ▶ With a focus on collaboration between a college and a university and building on a long standing transfer relationship, King's & Fanshawe came together in 2015 to create a specialized transfer program in the area of Finance.
- ▶ In addition we were looking at transfer opportunities between the institutions to facilitate the mobility of students in finance.
- ▶ Together, an ongoing overarching goal is to support the mandate of mobility of students within southwestern Ontario.
- ▶ The goal of the project was to create an integrated program that takes 4 years to complete with successful graduates of the program receiving a Bachelor of Arts - Finance (3 year) degree from King's and a Business - Finance (2 year) diploma from Fanshawe

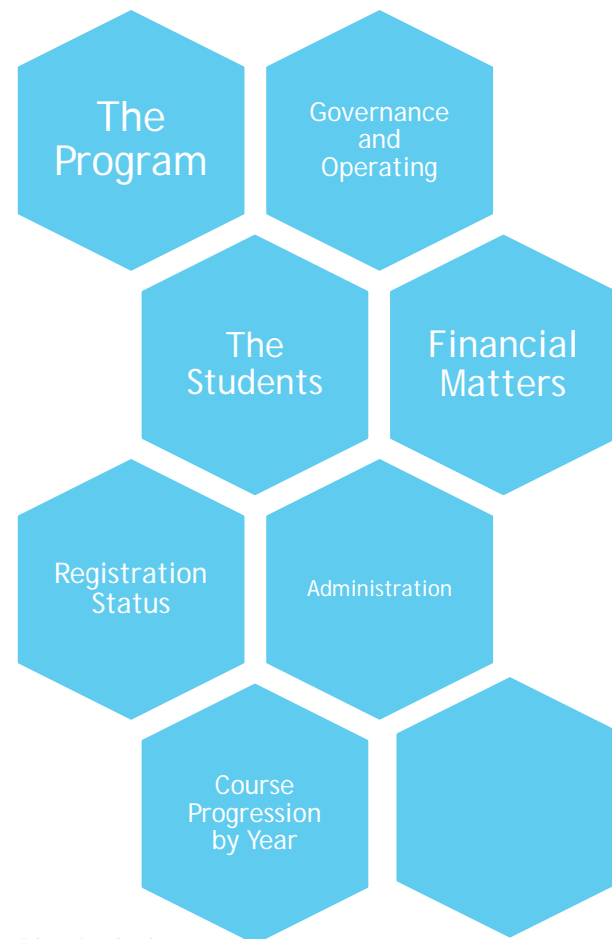
Program Model



The Project Process



Components of the Agreement



ONCAT 2016 Student Pathways in Higher Education Conference

Year 1 – King's

Course Code	Course Name
ECON1021A	Economics
MATH1229A	Algebra
Category B (Arts) Credit	Category B (Arts) Credit
BUS1220E	Introduction to Business
Elective (1000 level)	Elective
ECON1022B	Economics
MATH1225B	Calculus

Year 2 - Fanshawe

Course Code	Course Name
WRIT1032/34	Reason and Writing
BUSI1068	Effective Meetings & Presentations
FINA1024	Financial Planning
FINA1053	Mutual Funds in Canada
MKTG1012	Introduction to Marketing
MATH1057	Math of Finance
COMM3020	Business Communications
INSR3014	Life & Health Insurance Planning
FINA3032	Investment in Canada
FINA1013	Retirement Planning
FINA1025	Individual Taxation

Year 3 – King's

Course Code	Course Name
ECON2220A	Intermediate Macroeconomics I
ECON2222A	Econometrics 1
Bus 2257	Accounting and Business Analysis
Actuarial Sciences 2053	Actuarial Sciences
ECON2221B	Intermediate Macroeconomics II
ECON2223B	Econometrics 2
2XXXE	Senior Essay course (2000 level or above)

Year 4 – Fanshawe/King's

Institution	Course Code	Course Name
Fanshawe	FINA3036	Comp. Financial Plan
Fanshawe	FINA3041	Portfolio Management
Fanshawe	FINA3030	Tax Planning
Fanshawe	FINA1012	Risk Management & Estate Planning
Fanshawe	MGMT3059	Strategic Client Engagement
Fanshawe	LAWS3018	Business Law
King's	MOS 3310	Finance for MOS
King's	MOS 3312	Derivatives Securities for MOS
King's	Econ 3370	International Finance
King's	Elective 2000+ level	Elective 2000+ level

Benefits of Agreement

- ▶ Students save a full year of time in school and tuition fees
- ▶ Students earn two sought after credentials (diploma & degree)
- ▶ Students have the ability to access all aspects of both campuses (bursaries, scholarships, athletics, etc.)
- ▶ Students will have an educational background in both personal and corporate finance (normally they would have one or the other), making them highly marketable in the workforce
- ▶ Professional credentials (CFP, CSC, LLQP, CFA)
- ▶ Focus groups (industry & student) reacted very positively to the opportunity for this specific set of credentials to be offered together
- ▶ High enrolment potential for program as it is a unique offering in Ontario

Important Aspects of the Agreement

- ▶ The course requirements from each institution are mutually recognized so that students may graduate within the required time frame
- ▶ The integrated program is governed and delivered in such a fashion that King's University College and Fanshawe College will be considered equal partners
- ▶ Students pay college diploma tuition fees while at Fanshawe and university degree tuition fees while at King's
- ▶ Student alternate years between institutions
- ▶ Students graduate with both parchments (diploma and degree)
- ▶ Welcome to attend both convocation ceremonies
- ▶ OUAC application

Lessons Learned

- ▶ Timelines were tight; working with 2 institutions requires extra time built in to allow for various processes required at each institution
- ▶ Institutional cultures are important to be aware of when planning project phases; each institution has a different process flow for agreements and transfer
- ▶ Communication is key, keeping all stakeholders informed as progress is made. This can be difficult when many stakeholders are involved with the project.
- ▶ Keeping the best interest of the student as the focus of the agreement is of utmost importance

Next Steps

- ▶ Agreement is in final senate approval stages at King's University College at Western University
- ▶ Upon signing, agreement will be uploaded to the ONTransfer database
- ▶ Promotion and communication of the program
- ▶ Welcoming first applicants
- ▶ Tracking success



Questions & Discussion

ONCAT 2016 Student Pathways in Higher Education Conference

Thank-you

Mary Pierce
Chair,
Lawrence Kinlin School of Business,
Fanshawe College
mpierce@fanshawec.ca

Tracy Cunningham
Associate Registrar,
King's University College,
Western University
Tracy.cunningham@kings.uwo.ca

Minette Klazinga
Pathways Consultant
Lawrence Kinlin School of Business,
Fanshawe College
mklazinga@fanshawec.ca