



FIN 481R Syllabus

For additional course information, including prerequisites, corequisites, and course fees, please refer to the Catalog: <https://catalog.uvu.edu/>

Semester: Spring

Course Prefix: FIN

Course Title: PFP Internship

Year: 2025

Course and Section #: 481r-001 or 002

Credits: 3 credits (sometimes 1 or 2)

Course Description

PFP internship course has students report on their learning experiences working at a financial planning/wealth management firm, or in broader financial services, or as a coach in the Money Success Center.

Course Attributes

This course has the following attributes:

- General Education Requirements
- Global/Intercultural Graduation Requirements
- Writing Enriched Graduation Requirements
- Discipline Core Requirements in Program
- Elective Core Requirements in Program
- Open Elective

Other: *Click here to enter text.*

Instructor Information

Instructor Name: Luke Dean KB 432-c Luke.Dean@uvu.edu

Student Learning Outcomes

Students will learn through hands on, engaged learning in financial services. Students will learn how to use some software, and how to accomplish basic objectives to assist their employers as they serve clients.

Course Materials and Texts

None required.

Course Requirements

Course Assignments, Assessments, and Grading Policy

Course Outline:

Since this is an internship and each internship is different, the primary requirement from you is to report on your internship. It is expected that you will submit an Internship Plan at the beginning of the Internship/Semester; Progress reports every week; and a Final Internship report at the end of the internship/semester. All assignments are due on Saturdays and can be submitted through Canvas.

Canvas is set up with these reports listed as assignments. If your internship mirrors the semester you will be asked to complete the Internship Plan, the Final Internship Report, and Internship Progress reports. If the dates of your internship are different please contact me so we can determine what is appropriate for your internship.

Some of you may work for a company that does not want you to prepare any written reports about the internship. If this is the case you can submit your reports to me in a face to face meeting (or perhaps by telephone). If you are in this situation please let me know so we can schedule times to meet.

GRADING POLICY

The course is a “credit” or “no credit course”. I designed canvas grading so that approximately 100 points are possible. This is subject to change each semester as different paperwork is required by the UVU internship office, or as PFP events are scheduled for recruiting. The points are earned as follows:

Internship Progress Reports (weekly til hit 180+ hours.)	50
Internship Completion Survey	10
Supervisor Evaluation	10
Attend Banquet* or Speed Networking*	20
<u>Dr. Dean talked to supervisor</u>	<u>10</u>
Total Points Possible	100 pts.

*Not in summer semester

Grades are determined on a percentage basis as follows:

To receive credit, you need to complete 225 hours of work for your internship provider and also the above assignments. But if you do not complete 225+ hours of good work for your firm/supervisor than I can not give a “credit” grade.

CR = Credit

NC = No Credit

Late assignments will be accepted but points will be deducted. **I look forward to working with each of you. Please let me know if I can be of assistance in making your internship successful.**

Required or Recommended Reading Assignments

Some additional reading assignments may be assigned during the semester.

General Description of the Subject Matter of Each Lecture or Discussion

Students submit weekly summary reports on what they are learning in their internship experience and how many hours they are accruing. Need 180+ hours of work experience in financial services during the semester to get 3 credits in this class.

Required Course Syllabus Statements

Generative AI

The use of AI not allowed in this course.

Using Remote Testing Software

This course does not use remote testing software.

This course uses remote testing software. Remote test-takers may choose their remote testing locations. Please note, however, that the testing software used for this may conduct a brief scan of remote test-takers' immediate surroundings, may require use of a webcam while taking an exam, may require the microphone be on while taking an exam, or may require other practices to confirm academic honesty. Test-takers therefore shall have no expectation of privacy in their test-taking location during, or immediately preceding, remote testing. If a student strongly objects to using test-taking software, the student should contact the instructor at the beginning of the semester to determine whether alternative testing arrangements are feasible. Alternatives are not guaranteed.

Required University Syllabus Statements

Accommodations/Students with Disabilities

Students needing accommodations due to a permanent or temporary disability, pregnancy or pregnancy-related conditions may contact UVU [Accessibility Services](#) at accessibilityservices@uvu.edu or 801-863-8747.

Accessibility Services is located on the Orem Campus in BA 110.

Deaf/Hard of Hearing students requesting ASL interpreters or transcribers can contact Accessibility Services to set up accommodations. Deaf/Hard of Hearing services can be contacted at DHHservices@uvu.edu

DHH is located on the Orem Campus in BA 112.

Academic Integrity

At Utah Valley University, faculty and students operate in an atmosphere of mutual trust. Maintaining an atmosphere of academic integrity allows for free exchange of ideas and enables all members of the community to achieve their highest potential. Our goal is to foster an intellectual atmosphere that produces scholars of integrity and imaginative thought. In all academic work, the ideas and contributions of others must be appropriately acknowledged and UVU students are expected to produce their own original academic work.

Faculty and students share the responsibility of ensuring the honesty and fairness of the intellectual environment at UVU. Students have a responsibility to promote academic integrity at the university by not participating in or facilitating others' participation in any act of academic dishonesty. As members of the academic community, students must become familiar with their [rights and responsibilities](#). In each course, they are responsible for knowing the requirements and restrictions regarding research and writing, assessments, collaborative work, the use of study aids, the appropriateness of assistance, and other issues. Likewise, instructors are responsible to clearly state expectations and model best practices.

Further information on what constitutes academic dishonesty is detailed in [UVU Policy 541: Student Code of Conduct](#).

Equity and Title IX

Utah Valley University does not discriminate on the basis of race, color, religion, national origin, sex, sexual orientation, gender identity, gender expression, age (40 and over), disability, veteran status, pregnancy, childbirth, or pregnancy-related conditions, citizenship, genetic information, or other basis protected by applicable law, including Title IX and 34 C.F.R. Part 106, in employment, treatment, admission, access to educational programs and activities, or other University benefits or services. Inquiries about nondiscrimination at UVU may be directed to the U.S. Department of Education's Office for Civil Rights or UVU's Title IX Coordinator at 801-863-7999 – TitleIX@uvu.edu – 800 W University Pkwy, Orem, 84058, Suite BA 203.

Religious Accommodation

UVU values and acknowledges the array of worldviews, faiths, and religions represented in our student body, and as such provides supportive accommodations for students. Religious belief or conscience broadly includes religious, non-religious, theistic, or non-theistic moral or ethical beliefs as well as participation in religious holidays, observances, or activities. Accommodations may include scheduling or due-date modifications or make-up assignments for missed class work.

To seek a religious accommodation, a student must provide written notice to the instructor and the Director of Accessibility Services at accessibilityservices@uvu.edu. If the accommodation relates to a scheduling conflict, the notice should include the date, time, and brief description of the difficulty posed by the conflict. Such requests should be made as soon as the student is aware of the prospective scheduling conflict.

While religious expression is welcome throughout campus, UVU also has a [specially dedicated space](#) for meditation, prayer, reflection, or other forms of religious expression.