Syllabus
CSR 48000: Field Experience in Financial Counseling & Planning

COURSE DESCRIPTION:
Approved in-service training and practical experience in financial counseling and planning in a financial services industry, a minimum of 280. 2.0 Credits. Prerequisites: Financial Counseling & Planning major, CSR 342, plus required attendance at organization meeting.

EQUALITY POLICY:
Racism, sexism, anti-Semitism and other forms of prejudice are expressly prohibited. If you feel that I have exhibited any form of prejudice, bring it to my attention. If you feel you have been a victim of prejudice, please talk to the Dean of Students or to me.

COURSE OBJECTIVES:
1. Provide exposure to career options in a real world setting through direct practice or by observation and interaction with colleagues at the internship site.
2. Apply theory and relevant coursework in a professional setting, where the student will combine academic and work site assignments.
3. Advance skills and professional experience to enhance the student's career development.

STUDENT RESPONSIBILITIES & COURSE REQUIREMENTS:
• Scheduled attendance at a mandatory organizational meeting.
• Obtain suitable employment and submit Site Approval Form to CSR Supervisor (see guidelines within this packet).
• Registration of CSR 48000 within the semester in which the work hours are being completed.
• Work a minimum of 280 hours AFTER the Site Approval Request form **has been verified and approved by CSR Supervisor.** ATTENTION! No work hours may be counted towards the required minimum 280 hours until the Site Approval Request Form is submitted and approved! Assignments turned in prior to this approval will not be accepted or graded.
• Represent Purdue University and the College of Health & Human Sciences in a professional manner on the job at all times.
• Satisfactory on-the-job performance. If your job performance is not satisfactory or you are terminated for just cause, we reserve the right to assign an F for your course grade.
• Completion of all course assignments in a timely and professional manner.
• Verification of total hours worked through paystubs which reflect cumulative work hours and/or weekly log signed by your work supervisor and submitted on a weekly basis (to be determined by CSR Supervisor.)
• Receipt of Midway Evaluation and Final Supervisor Report **DIRECTLY** from your supervisor. It is your responsibility to remind your work supervisor at least a week before, so he/she is certain to complete the form and mail it or send it as a PDF document on time. **NO HAND DELIVERED SUPERVISOR REPORTS FROM STUDENTS WILL BE ACCEPTED.**
• All assignments should be submitted via Blackboard.
## Important Deadlines & Grading

<table>
<thead>
<tr>
<th>DUE DATE:</th>
<th>ASSIGNMENT</th>
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<tbody>
<tr>
<td>ASAP!</td>
<td><strong>Site Approval Request Form</strong>: Immediately and BEFORE accumulation of applicable work hours begins. The form should be uploaded as a full document to the CSR 48000 Blackboard page showing the supervisor’s signature. Please confirm its approval by checking your email! Without the Site Approval Request Form, no credit will be given for hours worked! If you are unable to submit your Site Approval Request Form before the last date to drop a course in the semester, you MUST DROP THE COURSE to avoid receiving an F grade. <strong>The last day to drop this course is XXXX.</strong></td>
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| XXXX      | **Weekly Journals**: Submit a summary of your past week’s field experience on a weekly basis. By keeping a journal, you will be able to consciously assess what you have been learning and its’ relationship to your learning objectives, professional development and goals and also to your classroom work. Think of it as a reflective, analytical tool which will assist you in evaluating your experience.  
**HINT**: The effectiveness of writing in your journal is greatly diminished when you put off writing in it over a period of several days. You are encouraged to write notes after each day of work to assist you in writing your weekly journal.
| XXXX      | **Learning Objectives Report**: Follow the instructions in the assignment sheet provided within this packet.
| XXXX      | **Midway Supervisor’s Evaluation**: The supervisor's evaluation may be PDF’d to me as a full document directly from your supervisor’ email address. Under no circumstances should the supervisor's report come from you, or through your hands. If it does, it will count as zero points.
| XXXX      | **Last day to Drop CSR 48000 if you have not obtained suitable work.**  
**Last day to Add CSR 48000 if you find a last minute position and haven't already added it.** |
| XXXX      | **Final Report and Pay Stubs**: If you fail to turn in your final paper, you are not eligible for an “Incomplete” grade. Keep a copy of your entire report for yourself. **NOTE**: 5 points will be deducted from your assignments for EACH day late. This internship is a form of “independent study”, and all feedback comes at the end of the course when you receive your grade and pick up your papers. Do not expect any feedback during the semester other than for the Site Approval Notification and deadline reminders.
| XXXX      | **Final Supervisor’s Report**: The supervisor’s evaluation may be PDF’d to me as a full document directly from your supervisor’ email address. Under no circumstances should the supervisor's report come from you, or through your hands. If it does, it will count as zero points. |
Point Distribution:
- Site Approval 15 points
- Learning Objectives Report 40 points
- Weekly Journals 60 points
- ++Midway Supervisor Evaluation 15 points
- Final Report 150 points
- ++Final Supervisor Evaluation 100 points
TOTAL 380 points

GRADING: Your final course grade will be determined using the scale below:

<table>
<thead>
<tr>
<th>Grade</th>
<th>Percentage</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>A+</td>
<td>97-100%</td>
<td>368-380 pts</td>
</tr>
<tr>
<td>A</td>
<td>93-97%</td>
<td>353-367 pts</td>
</tr>
<tr>
<td>A-</td>
<td>90-93%</td>
<td>342-352 pts</td>
</tr>
<tr>
<td>B+</td>
<td>87-90%</td>
<td>330-341 pts</td>
</tr>
<tr>
<td>B</td>
<td>83-87%</td>
<td>315-329 pts</td>
</tr>
<tr>
<td>B-</td>
<td>80-83%</td>
<td>304-314 pts</td>
</tr>
<tr>
<td>C+</td>
<td>77-80%</td>
<td>292-303 pts</td>
</tr>
<tr>
<td>C</td>
<td>73-77%</td>
<td>277-291 pts</td>
</tr>
<tr>
<td>C-</td>
<td>70-73%</td>
<td>266-276 pts</td>
</tr>
<tr>
<td>D+</td>
<td>67-70%</td>
<td>254-265 pts</td>
</tr>
<tr>
<td>D</td>
<td>63-67%</td>
<td>239-254 pts</td>
</tr>
<tr>
<td>D-</td>
<td>60-63%</td>
<td>228-238 pts</td>
</tr>
<tr>
<td>F</td>
<td>Below 60%</td>
<td>227-0 pts</td>
</tr>
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Late Penalty for Assignments: 5 points will be deducted from total score for EACH day your assignment is late.

++Non-receipt of the supervisor's evaluation will result in a "0". Your site supervisor may choose to delay the submission of the evaluation until all of your hours are complete.
Suitable Job Sites and Survival Notes

GUIDELINES FOR SUITABLE JOB SITES:

Position: The appropriate position is one that involves a service or product related to a consumer's financial needs. Examples would include: financial intuitions, financial planning firms, employee benefits, invested firms, insurance firms, trust department, financial counseling agencies or government services such as the Social Security Administration.

Pay: Paid and unpaid positions are accepted. Unpaid positions must have a formal documentation of hours worked and signed by your supervisor.

How do I find a job? The department does not arrange interviews or positions – this is your responsibility, and it may require some diligence on your part, especially during the academic year. Occasionally potential openings may be forwarded to you via email (although no endorsement is provided since leads cannot be evaluated without the Site Approval Request Form information.) It is also advisable to check the Center for Career Opportunities website under the CCO Express (you must register to obtain access to the jobs databases). Also check the employment want ads in the Journal and Courier or the Purdue Exponent for possible leads. It is always a good idea for any job seeker to advise his/her friends and family of his/her job needs as many opportunities arise through acquaintances ("who you know"). Some students are successful at cold-calling companies they're interested in; be sure to have crisp, professional copies of your resume on hand!

Do I have to work in the Greater Lafayette area? No. If you work out of the immediate area, all communications can be handled by mail, phone, or e-mail. You will however, be expected to attend the required information session prior to the start of your work and to file your Site Approval Form as described above.

What if I have difficulty finding a job? If you have not found a job by the last date to drop under extenuating circumstances (July 13, 2011), you should drop the course. If you find a job later which will enable you to complete the course, make an appointment with your CSR Supervisor to determine whether it is appropriate to be “late add” and to consider available alternatives such as the possibility of an early site approval for the next semester.

What is required of my employer? Your employer must be willing to submit a midway and final evaluation of your on-site work. You are to show these forms to your supervisor at the time he/she signs off on your site approval form. If a company is not able to complete the CSR evaluation, you will receive O points for that portion of your grade.

A form is provided for this purpose, and a due date is indicated on the form to ensure its arrival in time for a grade to be submitted. It is your responsibility to schedule a meeting with your site supervisor to review your midway and final site supervisor’s evaluation. Your employer must also be aware that you are completing an academic requirement and may need assistance with obtaining company information pertinent to your research and final report.

What if I get a job but find out later that I can’t complete the 280 hours required before the due date? See your CSR Supervisor to discuss your options. IF you meet the following criteria, you MAY be eligible for an incomplete:

1. At least 185 hours (two thirds) will be completed before the due date and the job continues without interruption.
2. The Site Approval Form has been obtained and approved.
3. You initiate a request for an incomplete IN WRITING prior to the final report due date, outlining a schedule for completion, and attach documentation of at least 185 completed hours.
4. You complete your report and submit it on the regular due date.

There may be better options, so it is important to discuss your situation with your CSR Supervisor well in advance of the end of the term. Any other problems you may have should be discussed with your CSR Supervisor.