



## CSR 48000 Financial Counseling & Planning Internship

- CRN 11462
- Summer 2022
- Instructional Modality: Async-Online
- Course Credit Hours: 1
- Prerequisites: Financial Counseling & Planning major; CSR 342 Minimum Grade of D-

All academic work is posted on the D2L/Brightspace site.

### Instructor Contact Information

- David A. Evans, PhD, AFC (inactive)
- Office: Matthews Hall, room 318
- Office Hours: By appointment only. Please email [daevans@purdue.edu](mailto:daevans@purdue.edu) anytime you would like to meet.
- Office Phone/Voicemail: (765) 494-3596; Text: (765) 421-2914 (mobile)
- E-mail: [daevans@purdue.edu](mailto:daevans@purdue.edu)

### Course Description

Supervised internship in the financial services industry. The experience will enable students to develop their professional interest and skills. Attendance at a pre-planning meeting required. Permission of department required.

### Learning Resources, Technology & Texts

*Students are automatically enrolled in the **Learning Online 101** course in Brightspace, a self-paced elective designed to help students be better prepared for hybrid and online learning*

There is no required textbook

### Course Learning Outcomes

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

- This course does not meet in person and therefore, an official attendance policy is not required. However, if you fail to appear at your internship and are fired as a result, you will receive a grade of F in this course.
- Obtain suitable employment and submit the Site Approval Request Form.
- Registration of CSR 48000 within the semester in which the work hours are being completed.
- Work a minimum of 140 hours AFTER the Site Approval Request Form has been verified and approved by the instructor. **ATTENTION:** Work hours may be counted towards the required

minimum of 140 hours prior to the Site Approval Request Form being submitted if approved by the instructor! 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 pay stubs which reflect cumulative work hours and/or weekly log signed by your employer and submitted on a weekly basis. **Hours worked must be verified and stated through time sheets or pay stubs. A misrepresentation of hours-worked will result in a failing grade.**
- Receipt of the Midway Employer Evaluation and the Final Employer Evaluation DIRECTLY from your employer. It is your responsibility to remind your employer at least a week before so he/she is certain to complete the form on Qualtrics. Links in table below and on D2L/Brightspace
- All assignments should be submitted via D2L/Brightspace.
- **ATTENTION International Students:** It is VERY IMPORTANT that you consult with the International Students & Scholars office in Schleman Hall about required work authorization forms needed to fulfill this course’s requirement!

## Assignments

DUE DATE:	ASSIGNMENT
<b>ASAP!</b>  <b>See Brightspace Calendar for Due Dates</b>	<b>Site Approval Request Form (SARF):</b> Submitted immediately and <b>BEFORE</b> accumulation of applicable work hours begin (negotiable). The form should be emailed as a full scanned document with the employer’s signature and date. Please confirm its approval by checking your email! Without the Site Approval Request Form (or instructor approval in exceptional circumstances), 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 <b>MUST DROP THE COURSE</b> to avoid receiving an F grade.
<b>Last Day of Class.</b> <b>See Brightspace Calendar</b>	<b>Reflection Papers:</b> Complete 5 reflection papers until completed.
<b>Last Day of Class.</b> <b>See Brightspace Calendar.</b>	<b>The “You Are Here!” Report</b>
<b>Last Day of Class.</b> <b>See Brightspace Calendar.</b>	<b>Midway Employer Evaluation:</b> Your employer should fill out the midway evaluation found in Qualtrics. A link can be found here and in the online course. <a href="https://purdue.ca1.qualtrics.com/jfe/form/SV_abkkk6b4qbbhYUt">https://purdue.ca1.qualtrics.com/jfe/form/SV_abkkk6b4qbbhYUt</a>  Externs must upload proof of completion of half of the externship. Screenshots recommended.
<b>Last Day of Class.</b>	

<b>See Brightspace Calendar.</b>	<b>Final Report and Pay Stubs:</b> Turned in as one document in D2L/Brightspace. If you fail to turn in your final paper or verification of hours, you are not eligible for an Incomplete grade. Keep a copy of your entire report. 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. <b>Final Reports will not be accepted after the due date!</b>
<b>Last Day of Class. See Brightspace Calendar.</b>	<b>Final Employee Evaluation:</b> Your employer should fill out the final evaluation found in Qualtrics. A link can be found here and in the online course. <b>Final evaluations will not be accepted after the due date!</b> <a href="https://purdue.ca1.qualtrics.com/jfe/form/SV_bswOUccYrrh7KoB">https://purdue.ca1.qualtrics.com/jfe/form/SV_bswOUccYrrh7KoB</a>  Externs must upload a digital copy of their certificate of completion.

**GRADING:** All course grades and scores will be posted under the “My Grades” section in Brightspace. Grades will not be curved. The more points that each individual collects during the term, the higher the grade they will receive. Standard rounding rules will be used, in the case of partial points. Final grades will be given based on the following scale:

Assignment Title	Points Possible	Course Grading Scheme
Site Approval Request Form	15 points	90-100% = A
The “You are Here!” Report	40 points	80-89% = B
Reflection Papers (20 points each)	100 points	70-79% = C
Final Paper	180 points	60-69% = D
++ Midway Employee Evaluation	15 points	= <60% = F
++ Final Employee Evaluation	100 points	
<b>Total</b>	<b>450 points</b>	

++Non-receipt of the Midway or Final Employee Evaluation will result in a "0". Your employer may choose to delay the submission of the evaluation until all of your hours are complete.

ALL WORK MUST BE SUBMITTED BY THE DUE DATE **Last Day of Classes in the current semester - NO EXCEPTIONS!**

**SUITABLE JOB SITES AND SURVIVAL NOTES**

**Position:** The appropriate position is one that involves a service or product related to a consumer's financial counseling and/or planning needs. Examples would include financial planning firms, employee benefit companies, investment firms, insurance companies, trust departments, 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 Employer.

**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 MyCCO. Also check the employment want ads in the Lafayette Journal and Courier or the Purdue Exponent for possible leads. It is always a good idea for any job seeker to advise friends and family of job needs as many opportunities arise through acquaintances ("who you know!"). Some students are successful at cold-calling companies they are 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 be expected to attend the required information session prior to the start of your work and file your Site Approval Request 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, you should drop the course (check the Purdue academic calendar or ask your advisor for this date). If you find a job later which will enable you to complete the course, make an appointment with the course instructor to determine whether it is appropriate to be a "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 make your employer aware of these evaluations at the time he/she signs off on your Site Approval Request Form. If a company is not able to complete the CSR evaluations, you will receive 0 points for that portion of your grade. A form is provided for this purpose and a due date is indicated to ensure its arrival in time for a grade to be submitted. It is your responsibility to schedule a meeting with your site Employer to review your midway and final site Employee evaluations. 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 hours required before the due date?** See your instructor to discuss your options. If you meet the following criteria, you MAY be eligible for an incomplete: 1. At least 93 hours (two thirds) will be completed before the due date and the job continues without interruption. 2. The Site Approval Request 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. Documentation of at least 70 completed hours must be provided. The lecturer will decide if an Incomplete is granted. 4. You complete your Final Report and submit it on the regular due date. There may be better options, so it is important to discuss your situation with the instructor well in advance of the end of the term. Any other problems should be discussed with the instructor.

## ***Attendance Policy during COVID-19***

Students should stay home and contact the Protect Purdue Health Center (496-INFO) if they feel ill, have any symptoms associated with COVID-19, or suspect they have been exposed to the virus. In the current context of COVID-19, in-person attendance will not be a factor in the final grades, but the student still needs to inform the instructor of any conflict that can be anticipated and will affect the submission of an assignment or the ability to take an exam. Only the instructor can excuse a student from a course requirement or responsibility. When conflicts can be anticipated, such as for many University-sponsored activities and religious observations, the student should inform the instructor of the situation as far in advance as possible. For unanticipated or emergency conflict, when advance notification to an instructor is not possible, the student should contact the instructor as soon as possible by email, through Brightspace, or by phone. When the student is unable to make direct contact with the instructor and is unable to leave word with the instructor's department because of circumstances beyond the student's control, and in cases of bereavement, quarantine, or isolation, the student or the student's representative should contact the Office of the Dean of Students via [email](#) or phone at 765-494-1747. Our course Brightspace includes a link on Attendance and Grief Absence policies under the University Policies menu.

## ***Academic Guidance in the Event a Student is Quarantined/Isolated***

If you become quarantined or isolated at any point in time during the semester, in addition to support from the Protect Purdue Health Center, you will also have access to an Academic Case Manager who can provide you academic support during this time. Your Academic Case Manager can be reached at [acmq@purdue.edu](mailto:acmq@purdue.edu) and will provide you with general guidelines/resources around communicating with your instructors, be available for academic support, and offer suggestions for how to be successful when learning remotely. Importantly, if you find yourself too sick to progress in the course, notify your academic case manager and notify me via email or Brightspace. We will make arrangements based on your particular situation. The Office of the Dean of Students ([odos@purdue.edu](mailto:odos@purdue.edu)) is also available to support you should this situation occur.

## ***Classroom Guidance Regarding Protect Purdue***

The [Protect Purdue Plan](#), which includes the [Protect Purdue Pledge](#), is campus policy and as such all members of the Purdue community must comply with the required health and safety guidelines. Required behaviors in this class include: staying home and contacting the Protect Purdue Health Center (496-INFO) if you feel ill or know you have been exposed to the virus, properly wearing a mask [in classrooms and campus building](#), at all times (e.g., mask covers nose and mouth, no eating/drinking in the classroom), disinfecting desk/workspace prior to and after use, maintaining appropriate social distancing with peers and instructors (including when entering/exiting classrooms), refraining from moving furniture, avoiding shared use of personal items, maintaining robust hygiene (e.g., handwashing, disposal of tissues) prior to, during and after class, and following all safety directions from the instructor.

Students who are not engaging in these behaviors (e.g., wearing a mask) will be offered the opportunity to comply. If non-compliance continues, possible results include instructors asking the student to leave class and instructors dismissing the whole class. Students who do not comply with the required health behaviors are violating the University Code of Conduct and will be reported to the Dean of Students Office with sanctions ranging from educational requirements to dismissal from the university.

Any student who has substantial reason to believe that another person in a campus room (e.g., classroom) is threatening the safety of others by not complying (e.g., not wearing a mask) may leave the room without consequence. The student is encouraged to report the behavior to and discuss next steps with their instructor. Students also have the option of reporting the behavior to the [Office of the Student Rights and Responsibilities](#). See also [Purdue University Bill of Student Rights](#).

*Related Considerations:*

1. *A listing of recommended safe practices for the specific class or laboratory setting (other PPE or safety behavior) can be found at the links below.*
  - [Overarching SOP for Classrooms, Instructional Laboratories, and Experiential Courses](#)
2. *References Supporting Protect Purdue Compliance:*
  - Office of the Dean of Students [Protect Purdue Compliance Plan: Ask, Offer, Leave, Report](#)
  - Office of the Dean of Students [Managing Classroom Behavior and Expectations](#)

## Academic Integrity

[Purdue's Honor Pledge](#): "As a boilermaker pursuing academic excellence, I pledge to be honest and true in all that I do. Accountable together - we are Purdue."

Academic integrity is one of the highest values that Purdue University holds. Individuals are encouraged to alert university officials to potential breaches of this value by either emailing [integrity@purdue.edu](mailto:integrity@purdue.edu) or by calling 765-494-8778. While information may be submitted anonymously, the more information is submitted the greater the opportunity for the university to investigate the concern. More details are available on our course Brightspace table of contents, under University Policies.

## Nondiscrimination Statement

Purdue University is committed to maintaining a community which recognizes and values the inherent worth and dignity of every person; fosters tolerance, sensitivity, understanding, and mutual respect among its members; and encourages each individual to strive to reach his or her own potential. In pursuit of its goal of academic excellence, the University seeks to develop and nurture diversity. The University believes that diversity among its many members strengthens the institution, stimulates creativity, promotes the exchange of ideas, and enriches campus life. More details are available on our course Brightspace table of contents, under University Policies.

## Accessibility

Purdue University strives to make learning experiences as accessible as possible. If you anticipate or experience physical or academic barriers based on disability, you are welcome to let me know so that we can discuss options. You are also encouraged to contact the Disability Resource Center at: [drc@purdue.edu](mailto:drc@purdue.edu) or by phone: 765-494-1247. More details are available on our course Brightspace under Accessibility Information.

## Mental Health/Wellness Statement

**If you find yourself beginning to feel some stress, anxiety and/or feeling slightly overwhelmed, try [WellTrack](#).** Sign in and find information and tools at your fingertips, available to you at any time.

**If you need support and information about options and resources,** please contact or see the [Office of the Dean of Students](#). Call 765-494-1747. Hours of operation are M-F, 8 am- 5 pm.

**If you find yourself struggling to find a healthy balance between academics, social life, stress, etc.** sign up for free one-on-one virtual or in-person sessions with a [Purdue Wellness Coach at RecWell](#). Student coaches can help you navigate through barriers and challenges toward your goals throughout the semester. Sign up is completely free and can be done on BoilerConnect. If you have any questions, please contact Purdue Wellness at [evans240@purdue.edu](mailto:evans240@purdue.edu).

**If you're struggling and need mental health services:** Purdue University is committed to advancing the mental health and well-being of its students. If you or someone you know is feeling overwhelmed, depressed, and/or in need of mental health support, services are available. For help, such individuals should contact [Counseling and Psychological Services \(CAPS\)](#) at 765-494-6995 during and after hours, on weekends and holidays, or by going to the CAPS office of the second floor of the Purdue University Student Health Center (PUSH) during business hours.

## **Emergency Preparation**

In the event of a major campus emergency, course requirements, deadlines and grading percentages are subject to changes that may be necessitated by a revised semester calendar or other circumstances beyond the instructor's control. Relevant changes to this course will be posted onto the course website or can be obtained by contacting the instructors or TAs via email or phone. You are expected to read your @purdue.edu email on a frequent basis.

### *Related Considerations and Guidelines*

1. *If you experience any symptoms of COVID-19 or suspect you may have been exposed to someone with COVID-19 stay home and call the Protect Purdue Health Center at 765-496-INFO.*
2. *Keep your cell phone on to receive a Purdue ALERT text message.*
3. *Log into a Purdue computer connected to the network to receive any Desktop Popup Alerts.*
4. *If you have a "no cell phone" in class policy, allow one or two students who have signed up for Purdue ALERT to keep their phones on to receive any alerts*
5. *A two-page supplement (see Appendix B) at the end of this document provides resources to communicate or engage with your students in case of unexpected emergencies that affect the West Lafayette campus. Emergency notification is vital! Please consider allowing one or more of the options below to ensure you are quickly notified of an emergency.*