Business Bookkeeping and Accountant Assistant

This program incorporates a comprehensive range of instruction that prepares students for employment in two areas: Business Bookkeeping and Accountant Assistant.

Students may select individual courses or complete a certificate program.

Certificate Programs

The basic Business Bookkeeping Certificate Program prepares students to be full charge bookkeepers. Students must apply for the program (see page 5), complete three required courses with a grade of "C" or better and attend at least 80 percent of classroom instruction for each course. For the advanced Accountant Assistant Certificate, students must apply for the program (see page 5), complete six required courses with a grade of "C" or better and attend at least 80 percent of classroom instruction for each course. Full charge bookkeepers entering the Accountant Assistant Certificate Program are exempt from CFM 38: *Bookkeeping*. Those individuals who can submit evidence in the form of transcripts or employers' verification of equivalent course(s) or experience are also exempt from CFM 38.

BUSINESS BOOKKEEPING CERTIFICATE PROGRAM

Required Courses

CFM 38	Bookkeeping
EDP 07	Introduction to Microcomputing
CFM 47	Microsoft Excel

ACCOUNTANT ASSISTANT CERTIFICATE PROGRAM

Completion of the three courses listed above in addition to the following:

CFM 43	Fundamentals of Accounting
CFM 39	Computer Applications in Accounting Using QuickBooks
CFM 46	Introduction to Individual Taxation

Guarantee yourself a space in the course of your choice by registering early. In order for us to hold a course we must first meet registration minimums. If you don't want to see your course cancelled, don't wait until the day of the class to register.

Bookkeeping

CFM 38/$305

A hands-on practical approach that provides students with the skills to be full charge bookkeepers. Topics include the books of original entry: cash receipts and disbursements, sales, purchase, payroll, petty cash and the general journal; subsidiary ledgers: accounts receivable, payable, and controls; the general ledger and trial balance. Business taxes (payroll and sales) are also included. 4 CEU **T**

Sec. 1: **Saturdays, Feb. 21-May 15,** 9 a.m.-12 noon, 11 sessions. Sonia Rai, Lehman College staff.

Sec. 2: **Wednesdays, Feb. 25-May 19,** 7-9:45 p.m., 12 sessions. Kenneth G. Williams, manager of general accounting, Columbia University.

Introduction to Microcomputing

EDP 07/$245 (see page 14)

Microsoft Excel

CFM 47/$305

Learn to create a spreadsheet using Microsoft Excel. Topics covered include building formulas, copying and moving techniques, formatting, and saving and printing files. More advanced topics include building multiple-sheet files, creating graphs and using Excel functions. Enrollment limited: one student per PC. (Prerequisite: EDP 07: *Introduction to Microcomputing* or equivalent course or experience.) 3 CEU **T D**

Saturdays, Feb. 21-May 8, 11:35 a.m.-2:05 p.m., 10 sessions. Instructor: TBA

Fundamentals of Accounting

CFM 43/$360

Accounting principles and practices leading to the preparation and analysis of financial statements. Topics include accounting for inventories, plant assets, notes receivable and payable, partnership and corporation accounting, and interpretation of financial statements. (Prerequisite: CFM 38 or permission of the program coordinator.) 5 CEU **T**

Saturdays, Feb. 21-June 12, 9-11:50 a.m., 14 sessions. Kenneth G. Williams (see CFM 38**,** sec. 2 above).

T Textbook to be brought to first class meeting

D 3 1/2 inch HD diskette to be brought to first class meeting

Computer Applications in Accounting Using QuickBooks

CFM 39/$395

Featuring extensive hands-on experience on PCs, this course emphasizes a realistic approach to automated office procedures: general ledger; accounts receivable; accounts payable and payroll, using QuickBooks. Enrollment limited: one student per PC. (Prerequisites: CFM 38, CFM 43, EDP 07 or equivalent course or experience.) *One 100 MB PC-format ZIP disk to be brought to first class meeting. Cost of materials ($25) to be paid at first class meeting.* 4.3 CEU

Thursdays, Feb. 26-May 20, 6:30-9:30 p.m., 12 sessions. Irwin Winsten, CPA, president, The Software Consultants.

Introduction to Individual Taxation

CFM 46/$245

A hands-on approach to preparation of tax returns. Learn how to prepare both federal and state tax returns. Topics include filing requirements, exemptions, income and exclusions, interest and dividends, capital gains and losses, itemized deductions and tax calculations. N.Y. State and City taxes are covered. *Offered spring semesters only.* 3 CEU **T**

Wednesdays, Feb. 25-May 5, 7-9:30 p.m., 10 sessions. Larry Goldsmith, director of payroll, District Attorney's Office, Bronx County.

Recommended Course

Intermediate Microsoft Excel

CFM 48/$305

This course builds upon CFM 47: *Microsoft Excel* to provide a more in-depth view of spreadsheet design and advanced functions. Topics include: IF statements; macrodesigning; editing and debugging; lookup tables; solving formulas; what-if analysis; linking multiple workbooks; 3-D spreadsheets; pivot tables; customizing Excel and database functions. Enrollment limited: one student per PC. (Prerequisite: CFM 47 or equivalent course or experience.) 3 CEU **T D**

Thursdays, Feb. 26-May 6, 6:30-9 p.m., 10 sessions. Nancy Buckley, Dragonfly Unlimited, Creative Consultants.

T Textbook to be brought to first class meeting

D 3 1/2 inch HD diskette to be brought to first class meeting

Small Business Management

In the present increasingly complex business environment, starting and staying in business have become more challenging than ever. This program is presented in a modular format permitting students to earn a certificate in one semester. The certificate earned upon completion of this program is a valuable asset in maximizing opportunities for obtaining funding or credit.

Students may select individual courses or complete the certificate program.

Students must apply for the program (see page 5), complete four required courses and two elective courses with a grade of "C" or better and attend at least 80 percent of classroom instruction for each course.

Required Courses
SBM 75 How to Get Started
SBM 76 Financing the Business
SBM 79 Accounting for the Small Business
SBM 83 Marketing/Advertising

Elective Courses
SBM 84 Purchasing
SBM 81 Import/Export Trading
EDP 07 Introduction to Microcomputing

How to Get Started

SBM 75/$120

This introductory course in small business management surveys the various aspects of starting a business. Topics include: what it takes to succeed; legal aspects of the organization; leasing of premises; insurance needs and more. 1.5 CEU

Tuesdays, Feb. 24-March 23, 7-9:30 p.m., 5 sessions. Instructor: TBA

Financing the Business

SBM 76/$120

An in-depth approach to financing the business: necessary start-up capital; bank financing; factoring; availability of government assistance; and the business plan. 1.5 CEU

Mondays, Feb. 23-March 22, 7-9:30 p.m., 5 sessions. Edward Armas, finance manager.

FREE CAREER SEMINAR
Small Business Management
Saturday, January 17
10-11:30 a.m.
For information call (718) 960-8512

(Continued on next page)

Accounting for the Small Business

SBM 79/$120

To be successful, the entrepreneur must understand the financial aspects of a business. This course covers record keeping, business and payroll taxes, and an explanation of the financial statements. 1.5 CEU

Wednesdays, April 21-May 19, 7-9:30 p.m., 5 sessions. Saul Lieman, CPA.

Marketing/Advertising

SBM 83/$145

For a business to succeed, the entrepreneur must have the "know-how" to market a product or service. This course emphasizes the following subjects in a very practical manner: packaging; pricing; targeting the market on which to concentrate; the various forms of advertising; and promotion and distribution. 1.8 CEU

Tuesdays, April 20-May 25, 7-9:30 p.m., 6 sessions. Vincent De Martis, manager of purchasing, binding operations and shipping, H. W. Wilson.

Purchasing

SBM 84/$120

This course covers fundamental concepts of purchasing in today's economy. Topics include: the steps in the purchasing cycle from start to finish; vendor identification and selection; development of specifications; quality concepts; pricing considerations; negotiations; and ethics in purchasing. 1.5 CEU

Wednesdays, Feb. 25-March 24, 7-9:30 p.m., 5 sessions. Vincent De Martis (see above).

Import/Export Trading

SBM 81/$120

This introductory course acquaints students with the processes of setting up and running an import/export business. The "language," the terms and procedures involved in international trade are covered. Risks, financing, transportation, cautions, marketing and other practical advice are discussed. At the conclusion of the course, students will have acquired the basic knowledge to begin a successful import/export business. 1.5 CEU

Mondays, April 19-May 17, 7-9:30 p.m., 5 sessions. Catherine Doheny, international trade specialist.

Introduction to Microcomputing

EDP 07/$245 (see page 14)

Recommended Courses

Touring the Internet

PCW 15/$50 (see page 14)

Microsoft Excel

CFM 47/$305 (see page 6)

Personal Financial Planning

A Program Registered with Certified Financial Planner Board of Standards, Inc.

The Certificate Program in Personal Financial Planning presents techniques to formulate and execute comprehensive financial plans that assist clients in accumulating, conserving and transferring personal wealth. This 219-hour program consists of the following six courses:

- **Introduction to Financial Planning**
- **Risk Management**
- **Investments**
- **Tax Planning and Management**
- **Retirement Planning and Employee Benefits**
- **Estate Planning**

The program is especially recommended for persons in the following fields: retirement planning; accounting; law; banking; financial planning; pension planning; insurance brokerage or sales; real estate brokerage or sales; mutual fund sales; securities brokerage or sales.

Earn both the Personal Financial Planning Certificate and fulfill the education requirement for CFP® certification.

To earn the Lehman College Personal Financial Planning Certificate, students must complete the six courses listed above with a grade of "C" or better and attend a minimum of 80 percent of classroom instruction for each course. A maximum of two courses may be taken each semester. The program curriculum must be completed in four years.

Lehman College does not certify individuals to use the CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP® certification marks. CFP certification is granted only by Certified Financial Planner Board of Standards, Inc. to those persons who, in addition to completing an educational requirement such as this CFP Board-Registered Program, have met its ethics, experience and examination requirements.

Admission Policy

Applicants must have completed a minimum of 60 college credits prior to admission. Functional knowledge of financial analysis techniques and a basic understanding of economics are necessary background. To apply for this program, applicants must submit (1) a completed application form, (2) a non-refundable $25 application fee (check or money order) payable to Lehman College, and (3) an official college transcript. Send to:

Financial Planning Program
Lehman College
Office of Continuing Education
Carman Hall, Room 129
250 Bedford Park Boulevard West
Bronx, New York 10468-1589

Individual courses are open to those not enrolled in the program if space is available. A minimum of 60 college credits and relevant experience is recommended.

Introduction to Financial Planning

PFP 60/$415

Introduction to the principles and analytic techniques of personal financial management. Topics include overview of the economic environment, time value of money concepts, CFP Board's Code of Ethics and Professional Responsibility, regulatory environment, communication skills, and the financial planning process. Participants learn how to gather, process and analyze client information, and to provide a written plan with recommendations as to risk management, investments, tax strategies, retirement planning and estate planning. *For certificate program enrollees, this course is a prerequisite to all other courses.* 4.7 CEU

Thursdays, Feb. 26-May 27, 6:30-9:30 p.m., 13 sessions. Harry Singh, CFP®.

Risk Management

PFP 61/$395

Survey of risk management, primarily in the areas of life, health, casualty and liability insurance. Includes analysis of risk exposure, evaluation techniques for various insurance plans, and contract selection criteria from a cost-benefit standpoint. The candidate is introduced to the basic insurance contract and practical insurance checklists and to the principles of taxation as related to insurance premiums and benefits. The role of insurance in retirement and estate planning is also discussed. 4.5 CEU

Mondays, Feb. 23-June 14, 7-9:35 p.m., 14 sessions. Peter Heisler, CFP®.

Retirement Planning and Employee Benefits

PFP 64/$395

The subject matter covers the fundamentals of retirement planning and employee benefit plans and focuses on qualified plan coverage and eligibility requirements; suitability of an investment portfolio for a qualified plan and the integration of the plan with Social Security. The basic characteristics of specific employee benefits and the income tax impact to both employer and employee are discussed. In addition there will be a recommendation of a specific plan for a particular client situation. 4.5 CEU

Saturdays, Feb. 21-May 22, 9 a.m.-12 noon, 12 sessions. Donald Klein, Esq. and Jose Guevara-Escudero, Ph.D., CFP®, president, Interamerican Economic Services.

Estate Planning

PFP 65/$395

Study of various components of the estate planning process as they relate to the broader context of financial planning. Topics include the principles of the estate and gift taxation, trusts, property ownership, marital and charitable considerations, intrafamily transfers and postmortem planning. Emphasis is on the planning process, from data collection to recommendations of estate planning techniques. 4.5 CEU

Wednesdays, Feb. 25-June 2, 7-9:35 p.m., 14 sessions. Peter Heisler, CFP®.

Comprehensive Review for the CFP® Certification Examination

PFPR 70/$515

(texts not included)

This course is designed to prepare candidates for the ten-hour CFP® Certification Examination. The review covers the material from CFP Board's 101 topics list.

The review lectures are held on three consecutive weekends that will be completed 10 days prior to the exam.

Registrations are due prior to February 10, 2004.

Cost of texts: $375

Saturdays and Sundays, Feb. 21-March 7, 9 a.m.-6 p.m.

FREE CAREER SEMINAR
Personal Financial Planning
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