
Strategic Investment Planning 3 (3-0)

BA 2720

Course Outline

Text: Course Material from the Canadian Institute of Financial Planning

Prerequisite: Nil

Course Description: This course examines the characteristics of alternate investment products. Topics include fixed income products, equity products, mutual funds, real estate and tax shelters.

Course Objectives: To provide students with a knowledge of alternate investment products. This course transfers to the Canadian institute of Financial Planning's Strategic Investment Planning course. Students must write the institute exam to receive credit from the Canadian institute of Financial Planning. The Grande Prairie Regional College exam is for college credit only. Prior to writing the institute exam a passing grade in the GPRC course must be obtained.

Grading:

Midterm exam	30%
Final exam	40%
Assignments (4 @ 7.5% each)	30%

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Course Content

1. Introduction to Strategic Investment Planning
2. Guaranteed, Interest-Producing Investments
3. An Introduction to Bonds
4. Corporate Bonds and Bond Funds
5. An Introduction to Common Shares
6. Fundamental and Technical Analysis
7. Financial Derivatives
8. Mutual Funds
9. Tax-Advantages Investing
10. Tax Shelters
11. More Tax Shelters
12. Case Studies in Strategic Investment Planning.



Attendance: Regular attendance is expected.

Assignments: Assignments are considered late if they are not received at the beginning of class on the date due.

Late Penalties on assignments are deducted AFTER grades have been adjusted to the appropriate percentage value. For example, if an assignment is subject to a 1 mark late penalty, the grade is calculated as follows; 5/7.5 minus late penalty for a final mark of 4 out of 7.5

Tentative Class Schedule

Jan 6, 8	Intro, Ch. 1	
Jan 11, 13, 15	Ch. 1, 2	
Jan 18, 20, 22	Ch. 2, 3	
Jan 25, 27, 29	Ch. 4	Assign 1 (25 th)
Feb 1, 3, 5	Ch. 5	
Feb 8, 10, 12	Ch. 6	
Feb 17, 19	Review & Midterm	Assign 2 (16 th @ 2:00)
Feb 22, 24, 26	Winter Break	
Mar 1, 3, 5	Return Exam, Ch. 7	
Mar 8, 10, 12	Ch. 7, 8	
Mar 15, 17, 19	Ch. 8, 9	
Mar 22, 24, 26	Ch. 9, 10	Assign 3 (24 th)
Mar 29, 31	Ch. 10, 11	
Apr 5, 7, 9	Ch. 11, 12	
Apr 12, 14, 16	Ch. 12 & Review	Assign 4 (16 th)
Apr 20 - 28	TBA - Registrar	Final Exam