
Strategic Investment Planning 3 (3-0)

BA 2720

Course Outline

- Text: Course Material from the Canadian Institute of Financial Planning
- Prerequisite: This course requires financial math understanding. It is recommended to have passed BA1050
- 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. This course is also transferable to Athabasca University FNCE 322 (senior)

<u>Grading:</u>	Portfolio	10%
	Midterm exam	30%
	Final exam	30%
	Assignments	30%
	(4 @ 7.5% each)	

Instructor: K. Frei, M.B.A.
Telephone: 403-539-2007
Office: C413
Office Hours T/R 10:00 - 11:30
(I tend to wander, try to make an appointment)



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 assignments receive a maximum of 60%.

Tentative Class Schedule

Jan 4, 6	Intro, Ch. 1	
Jan 11, 13	Ch. 1, 2	
Jan 18, 20	Ch. 2, 3	
Jan 25, 27	Ch. 4	Assign 1 (25 th)
Feb 1, 3	Ch. 5	
Feb 8, 10	Ch. 6	
Feb 15, 17	Review & Midterm	Assign 2 (15 th)
Feb 22, 24	Winter Break	
Feb 29 & Mar 2	Return Exam, Ch. 7	
Mar 7, 9	Ch. 7, 8	
Mar 14, 16	Ch. 8, 9	
Mar 21, 23	Ch. 9, 10	Assign 3 (23 th)
Mar 28, 30	Ch. 10, 11	
Apr 4, 6	Ch. 11, 12	
Apr 11	Ch. 12	Assign 4 (12 th)
Apr 14-25	TBA - Registrar	Final Exam