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<b>Course title and number</b>	AGEC 438 – Investment Planning (3 credits)
<b>Term</b>	Fall 2016
<b>Meeting time/location</b>	Web-based course

### Course Description and Prerequisites

Applies investment principles considering families' goals, time horizons, risk tolerance, and tax implications to build investment portfolios; attributes of various asset classes; asset allocation, selecting securities, and portfolio management; developing successful investment programs for personal investors and financial planners.

### Instructor Information

Name	Nathan Harness, Ph.D., CFP®, Director of Financial Planning
Email address	<a href="mailto:nharness@tamu.edu">nharness@tamu.edu</a>
Office hours	Please schedule an appointment by emailing me in advance.

### Course Goal

Overall Goal: We will learn to apply knowledge of investment principles and securities markets to achieve financial goals considering risk, planning horizons, and taxes.

### Learning Outcomes

As a result of your participation in this course, you will be able to:

1. Describe the operations of the securities markets and the basic principles of investing and portfolio planning.
2. Understand the equity and fixed-income asset categories and their risks and roles in the portfolio.
3. Explain the use of mutual funds and ETFs in the portfolio and the guidelines for asset allocation and managing your own portfolio.
4. Identify and evaluate the roles of alternative investments, such as commodities and real estate, in the portfolio.

### Textbook and Resource Material

Textbook: Scott Smart *et al.* *Fundamentals of Investing*, 12th Edition, Prentice Hall, 2012. ISBN 978-0-13-307535-9. See readings on Course Schedule.

Financial Calculator: TI BA-II or comparable (not alpha programmable). I will be teaching from the BA-II as I am not an expert on the other financial calculators. We will also use Microsoft Excel in this course.

Additional references and readings will be assigned and posted on the course website. You should check the website regularly for announcements, points earned, readings, and homework.

## **Course Structure**

This online course is organized into 15 weeks. Each week will include some or all of the following resources and activities as follows:

- Assigned readings in the textbook
- Additional readings about current issues
- Videos of short lecture presentations
- Assignments related to the weeks topics
- The assessment or quiz over the topics of the week.
- There will also be special weeks when you will take one of the exams

Each week will be a little different with different amounts of time devoted these various activities. Tentatively, one week will end and the other begin at noon on Sunday. All assessments and assignments must be submitted by that time. You will have the option to complete everything during the work week and have your weekends free, or if you are occupied during the work week, you have the weekends to complete your studies.

## **Examinations**

The four examinations, including the final exam, are worth 100 points each. They are comprehensive, reviewing material from the beginning of the course, but emphasizing the more recent classes. Since this knowledge is comprehensive in nature and it is expected that your knowledge will improve as the class continues.

## **Assessments**

Various projects and quizzes will be assigned during the semester. During most weeks assessment quizzes will be assigned at the end of each week's activities, however, projects will not be assigned every week. You are responsible for assuring that the assignment has been properly submitted in eCampus.