

**Class Overview**

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| **General Class Information***All fields must be completed and posted in UVaCollab and World Viewable in SIS no later than two weeks prior to registration.* |
| **Subject Area &****Catalog Number** | Certified Financial Planning - NCPR 502-701 | **Class Title** | Investment Planning |
| **Credit Type** | **[ ]  Credit***[ ] Undergraduate**[ ] Graduate***[ ]  Noncredit** | **Delivery Method** | **[ ] P (In-Person)****[ ] CI (Classroom/Internet)****[ ] WB (Web-Based)** |

1. **Class Description (Use the SIS 400 characters from catalog description)**

Provides the student with an understanding ofthe various types of securities traded in financialmarkets, investment theory and practice, portfolioconstruction and management, and investmentstrategies and tactics. Prerequisites: FinancialAccounting, Macroeconomics, Statistics.

1. **Learning Outcomes**

Student should become knowledgeable about different investment choices available to clients, risjk tolerance measurements of clients, and asset allocation schemes.

1. **Assessment Components**

The tests worth 25% each and a stock analysis paper and Presentation worth 25%.

1. **Required Text (include ISBN, specific edition)**

L. Gitman, M. Joehnk, S. Smart, Fundamentals of Investing, Prentice Hall, 2011, 12th Edition. ISBN 0-136-11704-X.

1. **Required Additional Resources and Technical Components**

None.

1. **Other Class Expectations (for Classroom/Internet and Web-Based classes, specify any live (synchronous) meetings dates, times, delivery mode)**

None.