



Investment Planning

Course Description:

Investment Planning is the third course in the *ASM- Executive and Professional Education Center (EPEC) – Greene Consulting Hybrid Format of the CFP® Certification Professional Education Program*. This course covers investment vehicles (stocks, bonds, mutual funds, etc.) and investment analysis approaches, thereby providing a solid foundation for effective investment planning.

Grading:

Successful completion of this course requires two elements: attendance, instructor-led course sessions, and a passing score of 80% or better on the 25-question midterm and a passing score of 80% or better on the 25-question final exam.

Course Schedule:

The live, instructor led sessions meet every other Saturday from 8:00 AM – 12:00 PM. It is expected that the students participate in the online lessons for each program according to their pace and schedule, provided that their assignments are aligned with the discussion/review in the instructor led sessions.

Objectives:

By the end of this course, you will be proficient in the Fundamentals of Investment Planning. You will understand how the equity and fixed income securities markets operate, how to analyze equity and fixed income, and how to identify appropriate asset allocations.

Prerequisites:

Fundamentals of Financial Planning
Insurance Planning

Lessons:

Lesson 1: Key Principles of Investing
Lesson 2: Securities Markets and the Fed
Lesson 3: Equity Securities
Lesson 4: International Equity Securities
Lesson 5: Fundamental Equity Analysis
Lesson 6: Technical Equity Analysis
Lesson 7: Equity Investment Strategies
Lesson 8: Mutual Fund Investing
Investment Planning Midterm Exam (25 Questions)
Lesson 9: Fixed Income Securities
Lesson 10: Fixed Income Securities Analysis
Lesson 11: Fixed Income Investment Strategies
Lesson 12: Developing an Investment Policy Statement
Lesson 13: Asset Allocation



Lesson 14: Evaluating Portfolio Performance
Lesson 15: Fundamentals of Derivatives - Futures and Options
Lesson 16: Insurance and Real Estate Investments
Investment Planning Final Exam (25 Questions)

Textbook:

Title: Investment Planning
Publisher: Keir Educational Resources
Edition/Year: 2016 Edition

Instructor:

Mark Stamper, CFP®, ChFC®, CWS®
Bio attached.