

GRANDE PRAIRIE REGIONAL COLLEGE
DEPARTMENT OF BUSINESS ADMINISTRATION
COURSE OUTLINE

BA 2040 - WEALTH ACCUMULATION INVESTMENT 3(3-0)

TEXT: Course material from Canadian Institute of Financial Planning.

PREREQUISITE: Nil

COURSE DESCRIPTION: Introduces students to the process of wealth accumulation. Topics are portfolio construction and management, capital markets, financial economics, income taxes and investment theory.

COURSE OBJECTIVES: To provide students with a knowledge of investment. This course transfers to the Canadian Institute of Financial Planning's Wealth Accumulation course. Students must write the Institute exam to receive credit from the Institute. The GPRC exam is for college credit only. Prior to writing the Institute exam a passing grade in the GPRC course must be obtained.

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| GRADING: | Mid-term Exam | 30% |
| | Final Exam | 40% |
| | Assignments | 30% |

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| INSTRUCTOR: | J. Nutting | Tel: | 539-2815 |
| | M.Sc. Financial Economics | Room: | C210 |

COURSE CONTENT:

1. Wealth Accumulation Planning
2. Proprietorships and Partnerships
3. Corporations
4. Taxation of Property Income
5. Capital Gains and Losses
6. Accumulation Planning
7. Microeconomic Foundations
8. Financial Markets
9. Macroeconomic Environment
10. Investment Risks and Returns
11. Portfolio Theory
12. A Case Study in Wealth Accumulation