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GRANDE PRAIRIE REGIONAL COLLEGE

DEPARTMENT OF BUSINESS ADMINISTRATION

COURSE OUTLINE

WINTER 2002

BA 2040 Wealth Accumulation Investment 3 (3-0)

Test: *Certified Financial Planner Program of Study Course 2 WEALTH ACCUMULATION Study Guide*, Fall/Winter Edition 2001 from the Canadian Institute of Financial Planning. These materials will be used extensively. The materials will be available from the Department of Business Administration, and the cost of such materials includes registration as a student with the Institute.

Prerequisites:

- BA1050 Business Mathematics and Statistics and BA1110 Introduction to Accounting.
- Equivalent courses, or
- Consent of the instructor.
- It is **strongly** recommended that students registered in this course have obtained at least a 5 in BA1050.
- Students should possess and be familiar with the operations of a financial calculator such as Hewlett-Packard HP10B or HP10B II, Sharp EL-733A or Texas Instruments BAII Plus or Student Business Analyst.

Instructor:

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Course Description:

- Introduces students to the process of wealth accumulation.
- How wealth is acquired and preserved through the use of business and financial assets.
- Students will be required to acquire the knowledge, judgement, and expertise to understand the economic issues, business activities, investment products, their income tax implications and the numerous strategies

Course Objectives:

To provide students with knowledge of the process of wealth accumulation and maintenance, and the role of income tax planning.

Transfer:

This course transfers to the Canadian Institute of Financial Planning's Wealth Accumulation course. **Student must write and pass the Institute's exam to receive credit from the Institute.** The final exam in the course is for GPRC credit only. Prior to writing the Institute exam, a passing grade in the GPRC course **must** be obtained.

Evaluation:

Assignments (4)	40%
Mid-tem Exam	25%
Final Exam	35%

The assignments must be submitted on Multiple Choice forms as provided and Assignments submitted one week subsequent to due date **will not be accepted or marked.**

Course Content:

1. **Wealth Accumulation Planning**
2. **Proprietorships and Partnerships**
3. **Corporations**

Assignment 1 Due

4. **Taxation of Property Income**
5. **Capital Gains and Losses**
6. **Accumulation Planning**

Assignment 2 Due

7. **Microeconomic Foundations**
8. **Financial Markets**
9. **Macroeconomic Environment**

Assignment 3 Due

Mid Term Exam

10. **Investment Risks and Returns**
11. **Portfolio Theory**
12. **A Case Study in Wealth Accumulation**

Assignment 4 Due

Final Exam