

Grande Prairie Regional College
Department of Business Administration

BA 2040 Investment and Taxation Fundamentals (3-0-0)

Course Outline

Instructor	Lori Rae								
Contact	(780) 539-2711 or Lpalmer@gprc.ab.ca , Room C406								
Text	Course material from the Institute of Canadian Bankers								
Prerequisite	BA 1050 and BA 1110 or consent of instructor								
Course Objectives	<p>This course provides the basic principles on investment and taxation. The first third of the course introduces the concepts of risk and return as well as the different types of investments that are available. The second third of the course explores the structure of personal taxation by demonstrating how income deductions and credits are calculated. The last section of the course will look at the legal aspects of financial planning.</p>								
Grading	<table><tr><td>Midterm Exam #1</td><td>25%</td></tr><tr><td>Midterm Exam #2</td><td>25%</td></tr><tr><td>Assignments & Quizzes</td><td>15%</td></tr><tr><td>Final Exam</td><td>35%</td></tr></table>	Midterm Exam #1	25%	Midterm Exam #2	25%	Assignments & Quizzes	15%	Final Exam	35%
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Course Content	<ul style="list-style-type: none">• Financial asset classes• Risk and return• Money market instruments• Fixed income instruments• Equity instruments• Mutual funds• Introduction to personal tax planning• Calculating total income• Maximizing deductions• Calculating federal and provincial income taxes• Deferred income plans• Legal aspects of financial planning								

There will be unit quizzes following the completion of each chapter as well as two mid-term examinations both worth 25% of the final grade. The first mid-term will be held approximately during the week of Feb. 9-13th and the second mid-term will be tentatively held during the week of March 22-26th. The final exam, worth 35% of the final grade, will be scheduled during examination week by the registrar's office.

Class Participation and Attendance

In order to get the most out of this class, regular attendance and active participation is encouraged.

***The instructor reserves the right to change, or cancel any of these tentative dates or topics.**

***In order to receive ICB credit students must obtain 60% (C-) on the course.**