

GRANDE PRAIRIE REGIONAL COLLEGE
DEPARTMENT OF BUSINESS ADMINISTRATION
COURSE OUTLINE
WINTER 2001

BA 2040 Wealth Accumulation Investment 3 (3-0)

Test:

Course material from the Canadian Institute of Financial Planning

Prerequisites:

BA 1050 and BA 1110 or consent of the instructor

Instructor:

Pat Coristine
Office: C208
Telephone: 539-2895 (GPRC) 538-3290 (Home)

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. 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	40%
Mid-tem Exam	25%
Final Exam	35%

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**