CONTACT INFORMATION

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REQUIRED RESOURCES

TEXTBOOK: Keir Educational Resources, Keir’s Investment Planning

OTHER: Financial calculator, good internet connection, webcam
and headset

COURSE PROCEDURE AND POLICY

We employ a hybrid approach (both face-to-face and online) to teach this class. Face-to-face
classes comprise 18 hours, including two Saturdays and two Friday evenings. Saturday classes
are from 8:00 a.m. – 2:00 p.m., and Friday classes are from 6:00 – 9:00 p.m. Online classes
comprise 22 hours. Online meetings may include both one-on-one time with the instructor and
meetings with the entire class. Students will need a good internet connection, a webcam and a
headset for online meetings. Students must attend all face-to-face meetings and all required
online meetings. The textbook, calculator and course packet are required for each face-to-face
meeting.

I will be holding virtual help session through Zoom (online video conferencing tool) on regular
basis. Additional Zoom hours are going to be available as needed (i.e, exams). Also, you may
reach me through messenger service provided either by MSN or by Yahoo if you want. Please
contact me via e-mail if you want to hold me through messenger. I generally respond to email
messages within two working days. Response time may be a little longer on weekends and
holidays. Email messages should be sent to me at hshin@uttyler.edu. If you would like to
arrange a phone call at another time, just send me an email and we’ll schedule a time that
works for both of us. Please note that assignments will be returned within three days of the
assignment's due date. When I cannot meet that deadline, I will notify you with an alternative timeline.

**GRADES**

Exam 1: 33% of final grade

Exam 2: 33% of final grade

Exam 3: 33% of final grade

Final Exam: Replaces lowest of Exams 1-3, if needed. 70% is required to pass this course.

**COURSE OBJECTIVES**

Upon completion of this course, students will:

- describe characteristics, uses and taxation of investment vehicles (CFP Topic 34)
- assess types of investment risk (CFP Topic 35)
- apply quantitative investment concepts (CFP Topic 36)
- describe measures of investment returns (CFP Topic 37)
- use bond and stock valuation (CFP Topic 38)
- relate investment theory (CFP Topic 39)
- examine portfolio development and analysis (CFP Topic 40)
- compose investment strategies (CFP Topic 41)
- practice asset allocation and portfolio diversification (CFP Topic 42)
- compare and contrast asset pricing models (CFP Topic 43)

**COURSE SCHEDULE**

<table>
<thead>
<tr>
<th>Week</th>
<th>Day</th>
<th>Mode</th>
<th>Topics</th>
<th>Assignment</th>
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<tr>
<td>1</td>
<td>Friday</td>
<td>O</td>
<td>Chapter 2: Asset Classes and Financial Instruments</td>
<td>EOC Problems : Connect</td>
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|      | Saturday | F2F | Chapter 3: Securities Markets
Chapter 4: Mutual Funds and Other Investment Companies | EOC Problems : Connect |
| 2    | Saturday | O | Chapter 12: Macroeconomic and Industry Analysis | EOC Problems : Connect Exam 1 (Ch 2,3,4,& 12) |
| 3    | Friday | O | Chapter 5: Risk and Return: Past and Prologue | EOC Problems : Connect |
|      | Saturday | F2F | Chapter 6: Efficient Diversification
Chapter 7: Capital Asset Pricing and Arbitrage Pricing Theory | EOC Problems : Connect |
| 4    | Friday | O | Exam 2 | EOC Problems : Connect Exam 2 (Ch 5,6,7) |
|      | Saturday | F2F | Chapter 10: Bond Prices and Yields
Chapter 11: Managing Bond Portfolios | EOC Problems : Connect EOC Problems : Connect |
| 5    | Saturday | O | Chapter 13: Equity Valuation | EOC Problems : Connect Exam 3 (Ch 10,11,13) |
| 6    | Saturday | F2F | Chapter 18: Portfolio Performance Evaluation
Chapter 21: Taxes, Inflation, and Investment Strategy | EOC Problems : Connect |
| 7    | Friday | O | Final Exam | |