AGEC 489 Special Topics
Investment Planning
Fall 2013 • Online • Section 599

“It’s not rocket science.”
- John Bogle, founder and retired chairman of Vanguard

Investing is how we accomplish our goals for the future. To be successful, we must apply our knowledge of securities markets and investment principles while considering the time horizons, our risk tolerance, and the tax implications to build investment portfolios. Investment planning begins with understanding the attributes of various asset classes, asset allocation, and portfolio management. The emphasis is developing successful investment programs for personal investors and financial planners.

**Topics to be covered:**
- The Investment Environment, Securities Markets and Transactions
- Sources of Investment Information and Use of Indices
- Review of Time Value of Money
- Measuring Returns and Risk
- Modern Portfolio Concepts
- Market Efficiency and Behavioral Finance
- Investing in common stocks; Evaluating Common and Preferred Stocks
- Fixed-Income Securities, Bond Valuation
- Mutual Funds and Exchange-Traded Funds
- Asset Allocation Guidelines
- Managing Your Own Portfolio
- Options: Puts and Calls; Commodities and Financial Futures
- Tax-Advantaged Investments
- Real Estate and Other Tangible Investments

**Prerequisites:**
- AGEC 435, AGEC 330, FINC 409, or FINC 341; and junior or senior classification
- Agribusiness majors can use this class as a technical ag elective or a general elective.
- Agricultural Economics majors can use this class as a technical ag elective, a general elective, an AGEC elective, or a non-AGEC elective.
- Finance and Real Estate Option: If you are in the Finance and Real Estate option, you can use this course as a substitute for AGEC 432.

For more information, contact Gene Nelson at nelsong@tamu.edu.

This course is one of six comprising the Financial Planning curriculum at Texas A&M. This curriculum will qualify students to take the Certified Financial Planner™ exam. For more information, please visit www.cfp.net.