

Syllabus

FINC-522: Investment Planning

Course Description

This course focuses on investment planning. Topics include the characteristics of investment vehicles, various quantitative measures used in evaluating investments, client portfolios formulation, evaluating investment strategies, and diversifying asset allocations. Throughout the course, the student will develop a comprehensive, biblical perspective of investing.

Credit Hours: 3

Prerequisite Courses: None

Prerequisite Skills and Knowledge: Have completed an undergraduate degree. Any business courses may be helpful in understanding general financial planning concepts, but those are not prerequisite to this course.

Course Outcomes

Upon successful completion of this course, you should be able to:

1. Compare the characteristics, returns, and risks of all investment vehicles.
2. Develop a comprehensive, biblical perspective of investing.
3. Differentiate between types of investment risk and explain their impact on a client's portfolio.
4. Interpret quantitative measures in evaluating investment values, returns, and risks.
5. Formulate a client portfolio considering objectives, time horizons, and risk tolerance.
6. Evaluate investment strategies within the context of client behavior and goals.
7. Construct an appropriate client portfolio through diversified asset allocation consistent with a client's risk tolerance.

Course Textbook

Dalton, J. (2019). *Investment planning: Concepts and strategy*. Metairie, LA: Money Education.

Course Technology

Financial Calculator

IWU Diversity Statement

IWU, in covenant with God's reconciling work and in accordance with the Biblical principles of our historic Wesleyan tradition, commits to build a community that reflects Kingdom diversity.

We will foster an intentional environment for living, teaching, and learning, which exhibits honor, respect, and dignity. Acknowledging visible or invisible differences, our community authentically values each member's earthly and eternal worth. We refute ignorance and isolation and embrace deliberate and courageous engagement that exhibits Christ's commandment to love all humankind (2016).

Grading Scale

NOTE: In graduate level courses, a grade of C- or below will require the course to be repeated.

Grade	Quality Points Per Credit	Percentage	Score
A	4.0	95%–100%	950–1000
A-	3.7	92%–94.9%	920–949
B+	3.3	89%–91.9%	890–919
B	3.0	85%–88.9%	850–889
B-	2.7	82%–84.9%	820–849
C+	2.3	79%–81.9%	790–819
C	2.0	75%–78.9%	750–789
C-	1.7	72%–74.9%	720–749
D+	1.3	69%–71.9%	690–719
D	1.0	65%–68.9%	650–689
F	0.0	0%–64.9%	0–649

Grading Policies

Your grading policy for your course is dependent on your school and program. Your grading policies can be found in the [IWU Catalog](#).

Letter Grade Equivalencies

NOTE: In graduate level courses, a grade of C- or below will require the course to be repeated.

Grade	Description of Work
A	Clearly stands out as excellent performance. Has unusually sharp insights into material and initiates thoughtful questions. Sees many sides of an issue. Articulates well and writes logically and clearly. Integrates ideas previously learned from this and other disciplines. Anticipates next steps in progression of ideas. Example "A" work should be of such nature that it could be put on reserve for all cohort members to review and emulate. The "A" cohort member is, in fact, an example for others to follow.
B	Demonstrates a solid comprehension of the subject matter and always accomplishes all course requirements. Serves as an active participant and listener. Communicates orally and in writing at an acceptable level for the degree program. Work shows intuition and creativity. Example "B" work indicates good quality of performance and is given in recognition for solid work; a "B" should be considered a good grade and awarded to those who submit assignments of quality less than the exemplary work described above.
C	Quality and quantity of work in and out of class is average. Has marginal comprehension, communication skills, or initiative. Requirements of the assignments are addressed at least minimally.
D	Quality and quantity of work is below average. Has minimal comprehension, communication skills, or initiative. Requirements of the assignments are addressed at below acceptable levels.
F	Quality and quantity of work is unacceptable and does not qualify the student to progress to a more advanced level of work.

Course Workshop Summary

Workshop	Discussion*	Assignment*	Exam*	Total Points per Workshop
Workshop One	2/35	1/100	0/0	135

Workshop Two	2/35	1/100	0/0	135
Workshop Three	2/35	1/90	1/100	225
Workshop Four	2/35	1/100	0/0	135
Workshop Five	2/35	1/100	0/0	135
Workshop Six	2/35	1/100	1/100	235
End of Course Survey				10 Extra Credit
TOTAL	12/210	6/590	2/200	1000

* Number of Activities/Sum Point Totals

Workshop One Outline

Title	Due Dates	Estimated Time	Points
1.1 Exercise: Course Orientation	Due by the first day of the workshop.	30 minutes	0
1.2 Exercise: Read and Study	Due by the first day of the workshop.	5 hours	0
1.3 Devotional: Investment Risk	Due by the end of the workshop.	1 hour	0
1.4 Discussion: Risk and Return	Initial post due by the end of the fourth day of the workshop; two responses due by the end of the workshop.	2 hours	30

1.5 Discussion: Collaboration Forum	Due by the end of the workshop.	Varies	5
1.6 Assignment: Understanding Risk Case Study	Due by the end of the workshop.	5 hours	100
1.7 Exercise: Practice Quiz	The practice quiz is not required.	Varies	0
Totals		13.5 hours*	135

Workshop Two Outline

Title	Due Dates	Estimated Time	Points
2.1 Exercise: Read and Study	Due by the first day of the workshop.	5 hours	0
2.2 Devotional: Investing Priorities	Due by the end of the workshop.	1 hour	0
2.3 Discussion: First Things First	Initial post due by the end of the fourth day of the workshop; two responses due by the end of the workshop.	2 hours	30
2.4 Discussion: Collaboration Forum	Due by the end of the workshop.	Varies	5

2.5 Assignment: Risk Perspectives Case Study	Due by the end of the workshop.	5 hours	100
2.6 Exercise: Practice Quiz	The practice quiz is not required.	Varies	0
Totals		13 hours*	135

Workshop Three Outline

Title	Due Dates	Estimated Time	Points
3.1 Exercise: Read and Study	Due by the first day of the workshop.	4 hours	0
3.2 Devotional: Investing Goals	Due by the end of the workshop.	1 hour	0
3.3 Discussion: Hope in Riches	Initial post due by the end of the fourth day of the workshop; two responses due by the end of the workshop.	2 hours	30
3.4 Discussion: Collaboration Forum	Due by the end of the workshop.	Varies	5
3.5 Assignment: Calculator Problems	Due by the end of the workshop.	3 hours	90
3.6 Exercise: Practice Quiz	The practice quiz is not required.	Varies	0

3.7 Exercise: Mid-Term Prep	Mid-term exam preparation is not required.	Varies	0
3.8 Quiz: Mid-Term Exam	Due by the end of the workshop.	10 hours	100
Totals		20 hours*	225

Workshop Four Outline

Title	Due Dates	Estimated Time	Points
4.1 Exercise: Read and Study	Due by the first day of the workshop.	4 hours	0
4.2 Devotional: Investment Strategies	Due by the end of the workshop.	1 hour	0
4.3 Discussion: Philosophy and Judgment	Initial post due by the end of the fourth day of the workshop; two responses due by the end of the workshop.	2 hours	30
4.4 Discussion: Collaboration Forum	Due by the end of the workshop.	Varies	5
4.5 Assignment: Stock Picking Case Study	Due by the end of the workshop.	5 hours	100
4.6 Exercise: Practice Quiz	The practice quiz is not required.	Varies	0

Totals	12 hours*	135
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Workshop Five Outline

Title	Due Dates	Estimated Time	Points
5.1 Exercise: Read and Study	Due by the first day of the workshop.	4 hours	0
5.2 Devotional: Investment Portfolios	Due by the end of the workshop.	1 hour	0
5.3 Discussion: Responsible Investing	Initial post due by the end of the fourth day of the workshop; two responses due by the end of the workshop.	2 hours	30
5.4 Discussion: Collaboration Forum	Due by the end of the workshop.	Varies	5
5.5 Assignment: Mutual Fund Picking Case Study	Due by the end of the workshop.	5 hours	100
5.6 Exercise: Practice Quiz	The practice quiz is not required.	Varies	0
Totals		12 hours*	135

Workshop Six Outline

Title	Due Dates	Estimated Time	Points
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6.1 Exercise: Read and Study	Due by the first day of the workshop.	5 hours	0
6.2 Devotional: Investment Wisdom	Due by the end of the workshop.	1 hour	0
6.3 Discussion: Alternatives	Initial post due by the end of the fourth day of the workshop; two responses due by the end of the workshop.	2 hours	30
6.4 Discussion: Collaboration Forum	Due by the end of the workshop.	Varies	5
6.5 Assignment: Hedging Risk Case Study	Due by the end of the workshop.	5 hours	100
6.6 Exercise: Practice Quiz	The practice quiz is not required.	Varies	0
6.7 Exercise: Final Exam Prep	Final exam preparation is not required.	Varies	0
6.8 Quiz: Final Exam	Due by the end of the workshop.	10 hours	100
End of Course Survey	Due by the end of the workshop.	-	10 Extra Credit
Totals		23 hours*	235

* These times are only estimates. Actual assignment completion times will vary.

Course Assignments

TOTALS	93.5 hours*	1000
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* These timings are based on estimations of average times to complete each assignment. Actual assignment completion times will vary.

Course Development Resources

Blue, R. & Henneger, J. (2016). *Biblical financial planning: A biblical worldview of personal finance*. New York, NY: Pearson.

Keir, J., & Donaldson, S. (2017). *Investment planning: Ron Blue Institute edition*.
Middleton, OH: Keir Education Resources.

Expectations, Policies, and Important Student Information

School/Division	Link
DeVoe School of Business Division of Liberal Arts School of Services and Leadership	View School/Division Expectations, Policies, and Student Information
School of Educational Leadership	View School/Division Expectations, Policies, and Student Information
Wesley Seminary @ IWU	View School/Division Expectations, Policies, and Student Information
Nursing - Undergraduate	View School/Division Expectations, Policies, and Student Information
Nursing - Graduate	View School/Division Expectations, Policies, and Student Information

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Dictionary
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