Nebraska Wesleyan University

BUSAD 3730 Investment Planning

Catalog

2025-2026

Course Description

This course is designed for students interested in pursuing financial planning and asset management careers. This course explores the securities market, sources of information, risk/return, stocks, bonds, options, futures, and security analysis and culminates in portfolio construction and analysis. In addition, students will learn how to evaluate different asset classes for different investment objectives and determine their suitability for investors considering investment goals, time horizons, risk tolerance, and tax situations. The course and curriculum are approved by the CFP Board of Standards. This course is an online class offered through the Lower Cost Models Consortium.

Prerequisite(s): Grade of "C-" or higher in BUSAD 3710 General Principles of Financial Planning.

Course Hours

3 hours

Departments

1. Business, Accounting and Economics (Undergraduate)