Nebraska Wesleyan University

BUSAD 3730 Investment Planning

Catalog

2026-2027

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.

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

This course is offered online through a consortium of accredited colleges and universities. Instruction is provided by faculty employed by partner institutions within the consortium, with technology and administrative support provided by Rize Education. Oversight of courses offered through the consortium are reviewed and approved by Nebraska Wesleyan University. Students register through Nebraska Wesleyan University and receive academic credit from Nebraska Wesleyan University.

Course Hours

3 hours

Departments

1. Business, Accounting and Economics (Undergraduate)