



# Financial Planning

TEXAS A&M UNIVERSITY

## SUMMER 2015

### **AGEC 435 FINANCIAL PLANNING FOR PROFESSIONALS**

3-CREDIT HOURS | ONLINE | SECTIONS: 701, 720

This introductory course is for students who are interested in learning more about financial planning as a career opportunity. In this course, you will learn to apply the basic financial, economic, and institutional concepts needed to advise individuals, families, and small businesses in achieving their financial goals. Other topics include financial analysis, time value of money, investing strategies, income taxes, retirement and estate planning, and insurance.

### **AGEC 437 TAX PLANNING**

3-CREDIT COURSE | ONLINE | SECTIONS: 701, 720

This course applies the principles of income tax planning to enhance household income after taxes. If you are interested in learning how to implement useful tax planning strategies, this course is for you. Upon taking this course, you will be able to understand tax laws, concepts and rules while learning about the opportunities for tax planning. Furthermore, this course focuses on practical application for tax professionals and financial planners.

## FALL 2015

### **AGEC 435 FINANCIAL PLANNING FOR PROFESSIONALS**

3-CREDIT HOURS | ONLINE SECTIONS: 598, 702, 722 | CLASSROOM SECTIONS: 501

This introductory course is for students who are interested in learning more about financial planning as a career opportunity. In this course, you will learn to apply the basic financial, economic, and institutional concepts needed to advise individuals, families, and small businesses in achieving their financial goals. Other topics include financial analysis, time value of money, investing strategies, income taxes, retirement and estate planning, and insurance.

### **AGEC 438 INVESTMENT PLANNING**

3-CREDIT HOURS | ONLINE | SECTIONS: 598, 701, 720

This course applies investment principles considering families' goals, time horizons, risk tolerance, and tax implications to build investment portfolios. In this course, you will learn how to manage your investment portfolio as well as develop successful investment programs for personal investors and financial planners using financial planning software. Other topics include attributes of various asset classes, asset allocation and selecting securities.

Prerequisites for AGEC 435: AGEC 330 or FINC 409 or FINC 341; junior or senior classification.

Prerequisites for AGEC 437 & 438: AGEC 330 or FINC 409 or FINC 341; junior or senior classification.

Visit <http://financialplanning.tamu.edu> for more information.