

Success Is Easier Than Failure

Bus 353: Investments

David Schalow, PhD, CLU, ChFC, CFA, CFP

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Description: BUS 353. 3 cr. Construct and manage investment portfolios to meet needs of personal and institutional investors; select securities to balance income, risk, and capital growth. Prereq: 350

Text Book: Essentials of Investment by Bodie/Kane/Marcus (10th Ed.)

Professor Background: Dr. Schalow has 30+ years of University teaching experience. He has written many academic articles on a wide variety of topics, including marketing, corporate finance, investments, real estate, and insurance. He has also authored a textbook, California Real Estate Principles, and Instructor's Manual. In addition he has professional experience in Real Estate, Insurance, Financial Planning, and Investments and many different types of Consulting. He has also owned several businesses in the fields of Real Estate, Mortgage Lending, Consulting, Training and Online Marketing. In addition to the PhD in Business, he has the following Professional Credentials CLU (Chartered Life Underwriter), ChFC (Chartered Financial Consultant), CFA (Chartered Financial Analyst), CFP (Certified Financial Planner), CRS (Certified Residential Specialist, GRI (Graduate Real Estate Institute). Finally he has been licensed to sell, Financial Investments, All Lines of Insurance, and Real Estate in multiple states. (California, Nevada, Minnesota, and Wisconsin)

Contact Information: Office: CPS #434, dschalow@uwsp.edu, 715-346-3160

Office Hours: 12:30-2 pm MW, Wed 3:30-5:00 pm, Other hours can be arranged by appointment. Professor's Blog, www.DavidSchalow.com

(Tips on Success, Career Advice, Starting Businesses, Sales, Marketing, Stock and Real Estate Investing)

Grading:	90% and Up	A	Points and Weights of Exams, Quizzes, Papers, Projects, Attendance, and Participation will be Discussed the First Day of Class.
	89%	A-	
	88%	B+	
	80-87	B	
	79%	B-	
	78%	C+	
	70-77%	C	
	60-69%	D	
	Below 60%	F	

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Course Objectives

To provide the student a basic roadmap to pursue the dream of “**Financial Security**” through Investments.

Keys to Success

- Read Assignments Prior to Lecture
- Take Notes on Readings
- Take Notes on Lecture
- Consolidate the Two Sets of Notes
- Summarize Weekly Outcomes
- Decide You Want to Do Well in the Course
- Work At It

Methods of Assessment

Attendance and Participation Required

Three Exams 100 %

Extra Credit Opportunity

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Week Of:	Chapters:	
1/23	Ch 1, 2	Intro & Overview,
1/30	Ch 2, 3	Trading
2/6	Ch 4	Mutual Funds
2/13	Ch 5	Risk/Return
2/20	1 st Exam, Ch 6	Diversification
2/27	Ch 7	CAPM
3/6	Ch 8, 9	Efficient Markets/Behavioral/Technical Analysis
3/13	Ch 10	Bonds
3/20	Spring Break	
3/27	Ch 12, 13-14	Equity Valuation/Financial Statements
4/3	Ch 14,	<u>2nd Exam on Wed</u>
4/10	Ch 15	Options
4/17	Ch 16	Option Valuation
4/24	Ch 18	Performance Measurement
5/1	Ch 21	Taxes/Inflation/Strategy
5/8	Catch Up	
5/17	Final Exam	12:30 pm