

Personal Finance

Special Topics Course Spring 2009

Finance 490, Finance 579

WANT A COURSE THAT PROVIDES IMMEDIATE BENEFITS?

How about a course that:

- Provides knowledge of all the major areas of personal financial planning
- Guides you in the preparation of your own financial plan – a roadmap to your financial future
- Sets you a path to financial independence

And you also get four credits toward your degree

The major topics covered in the course are:

- Building your financial foundation
- Executing proven income tax savings strategies
- Don't go broke -- managing your debt wisely
- What are you worth -- preparing a net worth statement
- Your dreams and goals and the financial resources needed to achieve them
- Big ticket purchases -- automobiles and homes
- Savings and investments -- making your dreams come true
- Risk and return -- major investment risks and potential returns
- The role of asset allocation in achieving desired investment returns and managing risk
- Protecting your financial resources and the role of insurance
- Basic estate planning
- Financial issues at various stages of your life
- Financial advice and advisors
- Preparing a financial plan that is right for you

The course is taught by Tom Porter who was a pioneer in financial planning establishing a national practice at Touche Ross in the 1970's. He recently retired as an Executive Vice President of Bank of America where he was responsible for a major Business Unit that included investment banking, investment management, retail investments and financial planning. He has written four books on the subject of financial planning that have sold over 400,000 copies and has presented seminars and courses for over 15,000 executives and professionals.

He taught in the Foster Business School from 1966-1975 and has taught in the North European Management Institute in Oslo, Norway and the College of Management at the National University of Ireland. He developed this course for Foster Business School students in 2007 and received an overall rating of 4.7.