Personal Money Management

Lecturer	Dr. Majed R. Muhtaseb, CFA, CAIA
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Class time	Morning

Course Description:
Personal financial management including allocation of financial resources and planning of expenditures. Topics include personal budgeting, housing decisions, consumer protection, insurance options, personal loans and credit cards, personal income taxes, savings, investments, stocks, bonds, mutual funds, real estate and retirement options. The material is applied in settings that are relevant to students.

Materials/Text: Either
Personal financial planning, 14th Edition, Billingsley, Gitman & Joehnk

https://www.cengage.com/c/personal-financial-planning-14e-billingsley/#table-of-contents OR

Focus on Personal Finance, 6th Edition, Kapoor, Dlabay, Hughes and Hart

https://www.mheducation.com/highered/product/focus-personal-finance-kapoor-dlabay/M9781259919657.toc.html

And course specific articles available on the internet.

Requirements:
Attendance and Class participation, Discussion of current issues.
Financial planning assignments.
Two midterm exams and final exam.

Schedule:
Mon – Thur 9:00 – 12:00 noon

Assignments:
Reading required chapters,
Active engagement in class discussion and lecture.
Solving end of chapter problems
Case study analysis
Two midterm exams and final exam.
Will try to arrange field visit to local company of government agency.

Evaluation:
Attendance and Class participation 10%,
Personal applied money management assignments 20%.
Two midterm exams (20% each) and final exam (30%).