



Course Title: Financial Planning: Part II

Course Code: BUS 03

Instructor Name: Christopher Canellos, Senior Advisor, Stanford Financial Management Services

Class Sessions and Recording

Meeting days and times: Tuesdays, 7:00pm - 8:50pm PT

Meeting location: Zoom

Class sessions will be recorded for those unable to attend live.

Course Features:

The live session will be a lecture format with some Q&A.

Grade Options and Requirements

- No Grade Requested (NGR)
 - This is the default option. No work will be required; no credit shall be received; no proof of attendance can be provided.
- Credit/No Credit (CR/NC)
 - To obtain credit or a grade, students must prepare a short paper covering any topic discussed in the course.

**Please Note: If you require proof that you completed a Continuing Studies course for any reason (for example, employer reimbursement), you must choose either the Letter Grade or Credit/No Credit option. Courses taken for NGR will not appear on official transcripts or grade reports.*

Overview of Topics

Cash and Bond Investing:

Cash and Bond investing covers several aspects of these conservative investments including how to obtain the best interest rates possible while preserving flexibility, the risks inherent in these investments and how to view tax-exempt alternatives. We will describe the simple bond contract and the multitude of variations that are available. Annuities will also be discussed.

Real Estate:

Real estate will cover the considerations of obtaining, maintaining and selling a personal residence, as well as describing the investment and tax consequences of holding real estate for investment purposes.

Funding a College Education:

Funding a college education will look at several strategies to save for and otherwise fund college studies. Financial aid considerations will also be covered.

Retirement Planning:

Retirement planning will assist the student in estimating the need for funds at retirement and describe various saving strategies to achieve that target.

Estate Planning:

Estate planning discusses strategies to minimize the burden of the death tax, reduce income taxes on the assets you pass to your heirs and diminish administrative costs at the time of death. Wills, trusts and the probate system will be discussed.

**Please see course page for full description and additional details.*