

## **Topics in Investments: Managing Retirement Wealth**

FINC-GB.3176.30

Spring 2014

6 Classes, Tuesdays 6:00 to 9:00 pm, April 1 through May 6  
Office Hours: 4:30 to 5:30pm on Tuesdays at KMC 8-51

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One of the greatest opportunities in the next decades for finance and management professionals will be in finding ways to finance the **one-third** of your generation's lives that will be spent in non-wage earning retirement.

Changes by employers, government and in investment technology in the last decades have been massive, confusing and also enabling.

This brief 6-week course will prepare you, as Stern graduates, to cope personally with the changes and to lay the ground work for the rich "consumption" period of your life in retirement.

It will also prepare those who wish to establish careers in the exploding wealth management community of advisors, investors and asset management firms.

All the tools you have learned at Stern will be brought to bear in this course—with lectures, carefully selected readings and stimulating outside authorities in the field.

The lessons learned in this course will enrich your own careers and life from now until your well financed retirement years, as well as contributing to the welfare of your fellow citizens.

## Readings:

Readings will be selected for each class from a variety of sources; academic or journalistic papers, on line chapters from a national employee benefit research institute, and the power points presenting data and facts for discussion.

## Teaching Method:

Lectures and guest presentations will be used in the course.

Guest lecturers will include an authority on government entitlements, an authority on state and local government pension plans, one on long-term care insurance and another on investment strategies

Student participation will be expected and evaluated. Attendance is important. Be sure to bring your name plates and sit in the place you select on the seating template in the first class.

Case studies and interesting related media coverage will be put on Classroom for class discussion.

The NYU ethic policies will apply to all aspects of the class.

## Grading:

- 3 to 5 one-page essays, answering a question from the previous class: 50%
- A final exam will be a two hour, timed based set of four essays, selected by you from 6 possible topics: 50%

Class participation: Extra Credit