

TABLE OF CONTENTS

Part I: Tools of Investment Planning

Chapter 1	Introduction to Investment Planning	1
-----------	---	---

Fixed Income Investments

Chapter 2	Cash and Cash Equivalents	5
Chapter 3	United States Government Securities.....	13
Chapter 4	Corporate Bonds	19
Chapter 5	Convertible Securities.....	27
Chapter 6	Municipal Bonds	33
Chapter 7	Zero-Coupon Bonds.....	41
Chapter 8	Promissory Notes	45
Chapter 9	Guaranteed Investment Contracts (GICs)	51

Equity Investments

Chapter 10	Common Stocks.....	55
Chapter 11	Preferred Stock	63

Derivatives

Chapter 12	Warrants and Rights	69
Chapter 13	Stock Options.....	79
Chapter 14	Financial Futures.....	87
Chapter 15	Commodity Futures.....	95

Pooled Investments

Chapter 16	Mutual Funds	101
Chapter 17	Exchange-Traded Funds (ETFs).....	117
Chapter 18	Hedge Funds.....	127
Chapter 19	Separately Managed Accounts and Unified Managed Accounts (SMAs)	133
Chapter 20	Structured Products	137

Insurance Products

Chapter 21	Life Insurance	141
Chapter 22	Annuities	161

Alternative Investments

Chapter 23	Real Estate	189
Chapter 24	REITs (Real Estate Investment Trusts).....	203
Chapter 25	Asset-Backed Securities.....	217
Chapter 26	Oil and Gas.....	227
Chapter 27	Gold and Other Precious Metals.....	235
Chapter 28	Collectibles	241
Chapter 29	Limited Partnerships	247

Chapter 30	Private Placements and Venture Capital	253
Chapter 31	American Depositary Receipts.....	259

Part II: Techniques of Investment Planning

Chapter 32	Investment Risk.....	263
Chapter 33	Measuring Investment Risk.....	273
Chapter 34	Time Value Concepts	289
Chapter 35	Measuring Investment Returns.....	307
Chapter 36	Measuring Yield	339
Chapter 37	Security Valuation	351
Chapter 38	Asset Pricing Models.....	361
Chapter 39	Portfolio Management and Measurement.....	373
Chapter 40	Asset Allocation and Portfolio Construction	383
Chapter 41	Investment Strategies	395
Chapter 42	Formula Investing.....	407
Chapter 43	Hedging and Option Strategies	415
Chapter 44	Leveraging Investment Assets	441
Chapter 45	Taxation of Investment Vehicles.....	451
Chapter 46	Tax-Efficient Investment Strategies	489
Chapter 47	Investment Strategies for Tax-Advantaged Accounts	493
Chapter 48	The Net Investment Income Tax	525

Appendices

Appendix A	Present Value of Lump Sum	547
Appendix B	Present Value of Annuity Due.....	551
Appendix C	Present Value of Ordinary Annuity	555
Appendix D	Future Value of Lump Sum.....	559
Appendix E	Future Value of Annuity Due	565
Appendix F	Future Value of Ordinary Annuity	571
Appendix G	Tax Exempt Equivalents.....	577
Appendix H	Investment Characteristics Matrix and Investment Priority Valuator	581
Appendix I	Tax Rates and Credits	591
Appendix J	Million Dollar Goal Guide	593
Appendix K	Additional Time Value Concepts.....	595
Glossary	615
Index	631

For substantive updates to this product please visit: pro.nuco.com/booksupplements.