Course Overview: Investments and Wealth Management

Content Area:	**Business**
Course(s):	**Business Concepts, Personal Economics and Career Planning**
Time Period:	
Length:	**18 Weeks**
Status:	**Published**

Course Overview

Aligned to Standards: College Board or NJSLS 2020...
Revision Date:
In compliance with the NJ Student Learning Standards, climate change, career readiness, DEI (Diversity, Equity, & Inclusivity), as well as other standards have been integrated within the NBCRSD curricula (NJ Administrative Code Title 6A: chapter 8; Title 18A: chapter 35).

Course Overview

Sequence- Unit Titles, Summaries, and Number of weeks per unit (total = 18 semester/36 year)

Course title: Investments and Wealth Management

Grade level: 11–12

Length: 1 semester, 18 weeks

Course description: Investments and Wealth Management is a semester-long, project-based course that equips students with the knowledge, skills, and mindsets needed to build and protect wealth over a lifetime. Students explore the foundations of personal finance, including responsible credit use, budgeting, and the time value of money, before diving into major investment vehicles such as stocks, bonds, mutual funds, ETFs, and real estate. Furthermore, students will learn how financial markets operate, how securities are bought and sold, and the differences between common and preferred stock. The course also introduces the principles of portfolio construction, diversification, and risk management to help students understand how investors balance risk and reward. A dedicated unit explores the fast-paced world of active trading, examining market volatility, trading psychology, risk management strategies, and the distinctions between short-term speculation and long-term investing. Through simulations, case studies, and a culminating wealth management project, students will apply financial concepts, evaluate investment opportunities, and develop informed decision-making skills that support lifelong financial well-being.

Unit 1: *Financial Foundations – Building Wealth Through Smart Financial Decisions (4-5 Weeks)*

Unit 2: *Investment Vehicles, Financial Markets, and Portfolio Management – Understanding Investment Options, Securities, and Building Diversified Portfolios (8-9 Weeks)*

Unit 3: *Active Trading, Market Psychology, and Advanced Investing – Understanding Short-Term Trading Strategies, Investor Behavior, and Advanced Market Concepts (4-5 Weeks)*

Unit 4: *Personal Investment and Wealth Management Plan – Applying Financial Knowledge to Build a Lifetime Investment Strategy (1-2 Weeks)*

Reporting Student Progress (link to NB's Assessment System) All courses follow a balanced assessment system with Practice and Assessments. Each category includes formative, summative and alternative assessments.
Accommodations and Modifications (link to menu) Integrated accommodations and modifications for special education students, English language learners, students at risk of school failure, gifted and talented students, and students with 504 plans.