

**Osher Lifelong Learning Institute  
at the University of Delaware**

Fall 2022

**Principles of Investing  
Theodore J. Zak - Instructor**

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<b>Week</b>	<b>Topic</b>
1	Investing Basics - Financial Assets & Risk / 2022 -Return of Volatility
2	Bond Basics - Taxable (Corporate and U.S. Treasury) & Tax Free (Municipal)
3	Fixed Income (Bond) Alternatives in a Low Interest Rate Environment
4	U.S. Equity Investing (Terms & Historical Data)
5	International Investing
6	Mutual Fund Basics and 529 College Saving Plans
7	Index Investing and Exchange Traded Funds
8	Behavioral Finance - Investment Behavior and the Biases That Undermine Sound Investment Decisions
9	Investment Policy and Asset Allocation
10	Annuities and Lifetime Income
11	Long Term Care & Estate Planning Concepts
12	Private Money Management, Separately Managed Accounts (SMA) / Dividend Investing
13	Course Summary and Strategies for 2022 and Beyond

Your instructor does not take into account any particular individual's economic or financial situation, or any individual's investment goals, specific needs or demands. Information provided to Finance and Economics investment, legal, regulatory, tax or accounting advice.

