

MBA 644 - Wealth Management Strategies for Corporations and Individuals

This class will explore strategies and investment vehicles available to maximize return and minimize risk for both corporations and individuals.

Wealth management strategies, such as investor profile, diversification, risk management, estate planning. ., and investment vehicles, such as bonds, stocks, mutual funds, structure products, hedge funds. . ., are subjects to be discussed.

Class will be comprised of material discussion, on-line research and Q & A sessions and projects.

It is taking a very much hands-on approach towards investments. This class is designed to provide students with general knowledge about investments. It should enable students to make sensible and educated decisions in terms of managing corporation or individual wealth in the future.

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Experiences and Education

Account Vice President	UBS Financial Services, Inc.	Jan. 2006 – present
Second Vice President	Smith Barney, Inc.	Feb. 1998 – Jan. 2006
Financial Advisor	Waldron and Company	Sep. 1996 – Nov. 1997
Research Specialist	Research Associates	Aug. 1996 – Oct. 1996
Assistant Professor	Texas Tech University	Aug. 1991 – June 1996
Ph.D.	Bowling Green State University	Aug. 1987 – June 1991
Master's	San Diego State University	Aug. 1985 – June 1987
Needham Standard	Taiwan	June 1984 – May 1985
Second Lieutenant	Taiwanese Infantry	Aug. 1982 – May 1984
Bachelor's	Chinese Culture University	Aug. 1978 – June 1982