

FINANCE - FIN

FIN 508 Corporate Finance 3 Credits

This course provides an introduction to the basic tools of financial management. Topics covered include the goal of financial management, analysis of financial statements, the concept of cash flow, financial planning, time value of money, capital budgeting, the principles of stock and bond valuation, the risk/return tradeoff and capital markets theory, capital structure, cost of capital, dividend policy, working capital management and international aspects of finance.

Prerequisite: ECO 503 & ACC 505.

Offered: every fall, spring, & summer.

FIN 617 Portfolio Analysis 3 Credits

An introduction to modern portfolio theory and management. Strategies underlying portfolio construction and evaluation. Implications of market efficiency on portfolio management.

Prerequisite: MBA 620 or FIN 420.

Offered: every fall.

FIN 619 Financial Modeling 3 Credits

Programming in EXCEL via construction of custom functions and macros using Visual Basic. These techniques are applied to a variety of financial models.

Prerequisite: MBA 508 or FIN 508.

Offered: every fall.

FIN 620 Investment Management 3 Credits

This course introduces the student to the construction, management, and performance evaluation of investment portfolios. Primary topics include portfolio models, equilibrium in financial markets, market efficiency and the application of these concepts to the investment industry.

Prerequisite: MBA 508 or FIN 508.

Offered: every fall, spring, & summer.

FIN 622 Financial Institutions and Markets 3 Credits

This course examines the changing world of financial services and the role that financial intermediaries and financial markets are playing in a rapidly consolidating industry with new benchmarks and success factors. Universal banking as the new model will be analyzed. Emphasis will be placed on contemporary issues as well as a review of the history of this evolving industry.

Prerequisite: MBA 508 or FIN 508.

Offered: every spring.

FIN 623 Fixed Income Securities 3 Credits

This course discusses the various types of fixed income securities and the markets in which they are traded. Emphasis is placed on contact evaluation, extracting term/risk structure information from pricing, evaluating, investment opportunities and interest rate risk management.

Prerequisite: MBA 620 or FIN 620.

Offered: every fall.

FIN 624 Golden Griffin Fund I 3 Credits

This course is the first of a two semester program in which students become equity analysts and portfolio managers responsible for 'real money' portfolio of common equity securities (the Golden Griffin Fund or 'GGF'). In the fall semester, students begin the process of stock selection and analysis, leading to recommendations for investment by the GGF. Students follow and discuss current events in the economy and financial markets, and monitor and produce written reports regarding current GGF portfolio positions. Students serve on committees, including: Accounting and Finance; Legal and Compliance; Marketing; Public Relations and Portfolio Management. Each committee will have certain responsibilities throughout the fall and spring semesters. Students taking MBA 624 are expected to continue into the spring semester in MBA 629. Student must apply in early spring before the upcoming fall semester. **Offered:** fall

Prerequisite: MBA 620 or FIN 620 concurrent with MBA 812 or FIN 812.

Offered: every fall.

FIN 625 Advanced Corporate Finance 3 Credits

This course provides an in-depth treatment of corporate financial management. Topics from the introductory course (MBA 508) are developed in greater detail with emphasis on the underlying theories and more extensive applications to financial decision making. Additional topics beyond the introductory level are presented and discussed. The class relies primarily on lectures, problems and case discussions.

Prerequisite: MBA 508.

Offered: occasionally.

FIN 626 International Finance 3 Credits

International Finance (also known as 'Open-Economy Macroeconomics') is the study of the monetary and economic linkages among countries. The main goal of this course is to equip students with an understanding of the global macroeconomic environment. The following topics will be covered: purchasing power parity, interest rate parity, exchange rate determination, international capital flows. MBA 504, MBA 508

Prerequisite: MBA 508 or FIN 508 and MBA 504 or ECO 504.

Offered: Occasionally.

FIN 627 Multinational Banking 3 Credits

An in-depth study of practical applications and issues faced by internationally active, large and complex banking organizations. Emphasis is given to the applications related to Basel Accord and the impact it has on capital adequacy requirements, lending guidelines, and risk-based pricing by these financial institutions. Students will also learn the scope of international trade finance with a focus on how multinational banks handle import/export transactions in the global economy.

Prerequisite: MBA 508 or FIN 508.

Offered: occasionally.

FIN 628 Derivative Securities 3 Credits

This course discusses forward and futures contracts, swaps and options. Markets for these securities are described and analyzed. Modern techniques for identifying over and undervalued contracts are presented. The use of derivative securities in risk management is discussed.

Prerequisite: MBA 620 or FIN 420.

Offered: occasionally.

FIN 629 Golden Griffin Fund II 3 Credits

This course is the second of a two semester program in which students become equity analysts and portfolio managers responsible for 'real money' portfolio of common equity securities (the Golden Griffin Fund or 'GGF'). In the spring semester, students begin the process of original equity research, leading to recommendations for investment by the GGF. Students continue to follow and discuss current events in the economy and financial markets, and monitor and produce written reports regarding current GGF portfolio positions. Committee work started in the fall semester continues as well.

Prerequisite: either MBA 624 or FIN 624 and either MBA 812 or FIN 812.

Offered: every spring.

FIN 650 Introduction to Financial Planning 3 Credits

Survey of topics in wealth management and personal financial planning.

Review development of the wealth management industry, including the evolution of the high-net-worth investor segment. Various approaches to asset management, benchmarks for evaluating portfolio performance, risk tolerance, and tax and estate planning issues will be explored.

Prerequisite: MBA 620 or FIN 620.

Offered: fall.

FIN 651 Estate Planning 3 Credits

A new course that presents various aspects of estate and gift tax planning.

The valuation, transfer, administration and taxation of property will be covered along with strategies to efficiently transfer wealth. Other topics include property law, wills, trusts, income, gift, and death taxation. A course required for those interested in pursuing CFP certification.

Prerequisite: MBA 620 or FIN 620.

Offered: fall.

FIN 674 Business Analytics Using R 3 Credits

This course introduces students to the open source software language R.

Students will access publicly available financial data, process and analyze the data using R code. Analysis of financial ratios, investment portfolios, options, CAPM, Monte Carlo simulation, Value at Risk modeling and market microstructure will be explored.

Prerequisite: MBA 508 or FIN 508.

Offered: occasionally.

FIN 812 Equity Analysis 3 Credits

The analysis and valuation of equity securities is developed in stages using a case approach based on live publicly traded companies. Valuation models and the concept of value creation follows preliminary analysis of financial statements and market based financial information on risk and return.

Prerequisite: MBA 620 or FIN 620.

Offered: every fall.

FIN 841 Corporate Finance 3 Credits

This course provides an introduction to the basic tools of financial management. Topics covered include the goal of financial management, analysis of financial statements, the concept of cash flow, financial planning, time value of money, capital budgeting, the principles of stock and bond valuation, the risk/return tradeoff and capital markets theory, capital structure, cost of capital, dividend policy, working capital management and international aspects of finance.

Prerequisite: either ECO 822 & ACC 824 or ECO 503 & ACC 505.

Offered: spring day.