FINANCE - FIN

FIN 201 Introduction to Corporate Finance 3 Credits
An introduction to financial analysis. Topics covered include: financial statements, tools of financial analysis, bond and equity valuation, financial management.
Prerequisite: ECO 101, ECO 102 and ECO 255 (may register concurrently).
Offered: fall & spring

FIN 311 Intermediate Corporate Finance 3 Credits
Examination of the procedures and objectives of capital budgeting, the financing of the firm by means of debt and equity, and short-term and long-term financial management.
Prerequisite: FIN 201.
Offered: occasionally.

FIN 312 Investments 3 Credits
Introduction to the institutional features of securities trading, portfolio construction, and the capital asset pricing model. Valuation of equities and bonds and an introduction to various derivative instruments.
Prerequisite: FIN 201 & ECO 256.
Offered: fall & spring

FIN 350 Introduction to Personal 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: FIN 312.
Offered: fall

FIN 351 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: FIN 350.
Offered: fall

FIN 352 Risk Management & Insurance 3 Credits
Prerequisite: ECO 255 & FIN 201.
Offered: once a year.

FIN 354 Retirement Planning 3 Credits
Provides an overview of retirement planning including retirement savings need analysis, qualified retirement plan design, Social Security, Medicare, and more. In addition, group life, health, and disability insurance; non-qualified deferred compensation; and other commonly provided employee benefits are examined.
Prerequisite: FIN 312.
Offered: every fall.

FIN 412 Equity Analysis 3 Credits
The analysis and interpretation of financial information and accounting statements in order to assess security risk and return, credit worthiness, financing needs, and the valuation of the firm.
Prerequisite: FIN 312. Concurrent registration with FIN 485.
Offered: fall
FIN 485 Golden Griffin Fund I  3 Credits
This is the first course in a two-semester sequence in which students become equity analysts and portfolio managers for a real money portfolio of common equity securities (the Golden Griffin Fund, “GGF”). Students screen companies in the fall semester and perform detailed financial statement and valuation analyses in the spring semester. Current macroeconomic and financial market developments are discussed weekly. Monthly written reports regarding current GGF portfolio positions are produced by the student managers beginning in the summer. Students taking FIN 485 are expected to continue into the spring semester in FIN 486. NOTE: GGF students are selected during an application process during the student’s junior year.
Prerequisite: FIN 312; concurrent registration with FIN 412
Offered: Fall

FIN 486 Golden Griffin Fund II  3 Credits
This is the second course in a two-semester sequence in which students become equity analysts and portfolio managers for a real money portfolio of common equity securities (the Golden Griffin Fund, “GGF”). Students screen companies in the fall semester and perform detailed financial statement and valuation analyses in the spring semester. Current macroeconomic and financial market developments are discussed weekly. Monthly written reports regarding current GGF portfolio positions are produced by the student managers beginning in the summer. process during the student’s junior year.
Prerequisite: FIN 485
Offered: Spring

FIN 496 Finance Internship  1-4 Credits
Internships require an application and approval by the associate dean.
Prerequisite: student must complete a WSB Internship Application and obtain permission of a faculty supervisor, department chair, & the associate dean.
Offered: every fall & spring.

FIN 499 Independent Research  3 Credits
Study and work with a faculty supervisor. Project to be determined by faculty agreement. Independent studies require an application and approval by the associate dean.
Prerequisite: student must complete a WSB Independent Study Application Form & obtain the approval of a faculty supervisor, department chair & the associate dean.