

Finance (FIN)

Course information contained within the Bulletin is accurate at the time of publication in July 2024 but is subject to change. For the most up-to-date course information, please refer to the Course Catalog.

FIN 0822. Investing for the Future. 4 Credit Hours.

This class will teach you about seemingly complicated financial topics in a very comprehensible manner that will help you make informed financial decisions to ensure a secure financial future. We begin with identification of common financial problems among the "young, fabulous and broke" and how to avoid them. After thinking about life and financial priorities, we address why thinking about retirement now must be at the top of your list. We examine how to compute your retirement needs and how to get there, primarily with a focus on investing in common stock. You will learn how to think smart about big ticket purchases such as cars, housing, and graduate/professional education. Finally we will make sure you understand how to create a safety net to protect your future. NOTE: This course fulfills the Quantitative Literacy (GQ) requirement for students under GenEd and a Quantitative Reasoning (QA or QB) requirement for students under Core. Students cannot receive credit for this course if they have successfully completed ECE 0822, FIN 0922 or RMI 0822.

Course Attributes: GQ

Repeatability: This course may not be repeated for additional credits.

FIN 0922. Honors Investing for the Future. 4 Credit Hours.

This class will teach you about seemingly complicated financial topics in an understandable manner that will help you make well-informed "money" decisions to ensure a secure financial future. At the same time, we will use the tools learned to analyze important current events such as the constant dollar (or inflation-adjusted) minimum wage and unfunded pension liabilities. We begin with identification of common financial problems among the "young, fabulous and broke" and how to think about addressing them. After addressing life and financial priorities, you will learn why retirement savings must be at the top of your list. We examine how to compute your retirement needs and how to get there, primarily with a focus on investing in the stock market. You will learn how to think smart about big ticket purchases such as cars, housing, and graduate/professional education. Finally we will make sure you understand how to create a safety net to protect your future. NOTE: This course fulfills the Quantitative Literacy (GQ) requirement for students under GenEd and a Quantitative Reasoning (QA or QB) requirement for students under Core. Students cannot receive credit for this course if they have successfully completed ECE 0822, FIN 0822 or RMI 0822.

Cohort Restrictions: Must be enrolled in one of the following Cohorts: SCHONORS, UHONORS, UHONORSTR.

Course Attributes: GQ, HO

Repeatability: This course may not be repeated for additional credits.

FIN 2501. Introduction to Careers in Finance I. 1.5 Credit Hour.

This is the first 1.5 credit course in a two-course career orientation sequence offered over the fall and spring semesters. The course introduces students to various career paths in finance and prepares them for internships. The discussion of each career path covers general responsibilities, required skills, and desired academic background. The course includes various activities specific to different careers to provide students with a high level "hands-on" experience. The majority of discussed problems require Excel, and students obtain a working knowledge of it through in-class activities. Students also familiarize themselves with professional platforms used in the finance industry including Bloomberg, Capital IQ, and FactSet and learn how to find relevant information on company websites and in the SEC filings. Many classes have guest speakers who describe their own careers and job responsibilities. Note: Prior to fall 2023, the course title was "Finance Fellows I."

Class Restrictions: May not be enrolled in one of the following Classes: Junior 60 to 89 Credits, Senior 90 to 119 Credits, Senior/Fifth Year 120+ Credits.

Repeatability: This course may not be repeated for additional credits.

FIN 2502. Introduction to Careers in Finance II. 1.5 Credit Hour.

This is the second 1.5 credit course in a two-course career orientation sequence offered over the fall and spring semesters. The course introduces students to various career paths in finance and prepares them for internships. The discussion of each career path covers general responsibilities, required skills, and desired academic background. The course includes various activities specific to different careers to provide students with a high level "hands-on" experience. The majority of discussed problems require Excel, and students obtain a working knowledge of it through in-class activities. Students also familiarize themselves with professional platforms used in the finance industry including Bloomberg, Capital IQ, and FactSet and learn how to find relevant information on company websites and in the SEC filings. Many classes have guest speakers who describe their own careers and job responsibilities. Note: Prior to fall 2023, the course title was "Finance Fellows II."

Class Restrictions: May not be enrolled in one of the following Classes: Junior 60 to 89 Credits, Senior 90 to 119 Credits, Senior/Fifth Year 120+ Credits.

Repeatability: This course may not be repeated for additional credits.

FIN 2527. Digital Disruption in Financial Services. 3 Credit Hours.

The course provides students exposure to the current technological advances reshaping the financial services industry, using research papers, business news articles and guest speakers to highlight topics. The course focuses on blockchain, digital currencies, artificial intelligence, machine learning and the regulatory environment surrounding these innovations. The course requires intensive reading and reflection on the class speaker content. An important deliverable is a team project where students develop a fintech application.

Repeatability: This course may not be repeated for additional credits.

FIN 3101. Financial Management. 3 Credit Hours.

This course provides a survey of the financial problems associated with the life cycle of a business firm. Topics include: financial analysis and planning, capital budgeting, cost of capital, and the sources and uses of business funds. While the emphasis is on decision making within a corporate environment, the tools taught in this course are just as relevant to other forms of business organization and to personal financial management.

Field of Study Restrictions: Must be enrolled in one of the following Fields of study: Accounting, Actuarial Science, Business Management, Construction Engr Tech, Construction Mgt Tech, Career and Technical Education, Economics, Economics, Entrprnrship & Innovation Mgt, Entrepreneurship, Finance, Financial Planning, Human Resource Management, International Business, Law & Business, Legal Studies, Management Information Systems, Marketing, Real Estate, Risk Management and Insurance, Supply Chain Management, Statistical Sci + Data Analyt, Undeclared-Business & Mngt.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C- in (ECON 1101 or ECON 1901), (ECON 1102 or ECON 1902), (ACCT 2101 or ACCT 2103), and (STAT 2103 (may be taken concurrently), STAT 2903 (may be taken concurrently), STAT 2104 (may be taken concurrently), or MATH 3031 (may be taken concurrently))

FIN 3102. Financial Management Lab. 1 Credit Hour.

This online course is for finance majors and minors only. It is designed to provide a more in-depth study and application of topics covered in the FIN 3101/3901 courses, such as time value of money; bond and stock pricing, risk and return, financial analysis and planning, capital budgeting, cost of capital, capital structure. The course will be Excel intensive and focus on problems that require a higher level of critical problem solving skills beyond simple one-step solutions.

Field of Study Restrictions: Must be enrolled in one of the following Fields of study: Finance.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101 (may be taken concurrently), FIN 3901 (may be taken concurrently), 'Y' in CRFI01, or 'Y' in CRFI07)

FIN 3504. Intermediate Corporate Finance. 3 Credit Hours.

This course covers several areas of corporate financial management such as capital budgeting, capital structure, and firm valuation. Students learn how firms make investment decisions, determine the cost of capital, set the target leverage, and use financial statement forecasting and free cash flows to find the firm's value. Students demonstrate their proficiency in each area through an exam and case analysis using Excel.

Field of Study Restrictions: Must be enrolled in one of the following Fields of study: Accounting, Actuarial Science, Business Management, Economics, Economics, Entrprnrship & Innovation Mgt, Entrepreneurship, Finance, Financial Planning, Human Resource Management, International Business, Law & Business, Legal Studies, Management Information Systems, Marketing, Real Estate, Risk Management and Insurance, Supply Chain Management, Statistical Sci + Data Analyt, Undeclared-Business & Mngt.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, 'Y' in CRFI01, or 'Y' in CRFI07)

FIN 3505. Bank Enterprise Risk Management. 3 Credit Hours.

This course covers the management of banks and other financial institutions. Topics include the risk-return tradeoffs, regulatory constraints, performance analysis, asset-liability management, and management of liquidity, interest rate, and credit risks.

Field of Study Restrictions: Must be enrolled in one of the following Fields of study: Accounting, Actuarial Science, Business Management, Economics, Economics, Entrprnrship & Innovation Mgt, Entrepreneurship, Finance, Financial Planning, Human Resource Management, International Business, Law & Business, Legal Studies, Management Information Systems, Marketing, Real Estate, Risk Management and Insurance, Supply Chain Management, Statistical Sci + Data Analyt, Undeclared-Business & Mngt.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, FIN 3504, 'Y' in CRFI01, 'Y' in CRFI07, or 'Y' in CRFI02)

FIN 3506. Derivatives and Financial Risk Management. 3 Credit Hours.

This course introduces students to derivative securities. Students learn how to use, how to price, and how to trade financial derivatives such as futures, options, and swaps. Topics also include speculative and hedging strategies and financial risk management. Although the material of the course is quite quantitative, the focus is on the general principles of derivative pricing and practical use of derivatives rather than on mathematical technicalities.

Field of Study Restrictions: Must be enrolled in one of the following Fields of study: Accounting, Actuarial Science, Business Management, Economics, Economics, Entrprnrship & Innovation Mgt, Entrepreneurship, Finance, Financial Planning, Human Resource Management, International Business, Law & Business, Legal Studies, Management Information Systems, Marketing, Real Estate, Risk Management and Insurance, Supply Chain Management, Statistical Sci + Data Analyt, Undeclared-Business & Mngt.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, FIN 3504, 'Y' in CRFI01, 'Y' in CRFI07, or 'Y' in CRFI02)

FIN 3507. Security Analysis and Portfolio Management. 3 Credit Hours.

This course covers the main principles of investing in financial assets. Topics include the portfolio theory, asset pricing models, fundamental security analysis, and valuation of equity and fixed income securities. Students also learn how securities are traded in the financial markets and how to evaluate the investment performance.

Field of Study Restrictions: Must be enrolled in one of the following Fields of study: Accounting, Actuarial Science, Business Management, Economics, Economics, Entrprnrship & Innovation Mgt, Entrepreneurship, Finance, Financial Planning, Human Resource Management, International Business, Law & Business, Legal Studies, Management Information Systems, Marketing, Real Estate, Risk Management and Insurance, Supply Chain Management, Statistical Sci + Data Analyt, Undeclared-Business & Mngt.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, FIN 3504, 'Y' in CRFI01, 'Y' in CRFI07, or 'Y' in CRFI02)

FIN 3508. Fixed Income Modeling and Analysis. 3 Credit Hours.

This course provides a theoretical and applied analysis of the spot markets for fixed income instruments. Topics include: Estimation of zero coupon spot curves, computation of forward rates, day count conventions, valuation of bonds with embedded options, duration and convexity of bond yields, default risk probabilities, interest rate volatility, bond portfolio management strategies, and securitization. Note: Prior to fall 2017, the course title was "Money and Fixed Income Markets."

Field of Study Restrictions: Must be enrolled in one of the following Fields of study: Accounting, Actuarial Science, Business Management, Economics, Economics, Entrprnrship & Innovation Mgt, Entrepreneurship, Finance, Financial Planning, Human Resource Management, International Business, Law & Business, Legal Studies, Management Information Systems, Marketing, Real Estate, Risk Management and Insurance, Supply Chain Management, Statistical Sci + Data Analyt, Undeclared-Business & Mngt.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, 'Y' in CRFI01, or 'Y' in CRFI07)

FIN 3509. Real Estate Investment and Finance. 3 Credit Hours.

This course provides theoretical and practical analysis of investments in real estate assets. Topics include real estate interests, forms of ownership, market and site analysis, financing alternatives, and valuation techniques.

Field of Study Restrictions: Must be enrolled in one of the following Fields of study: Accounting, Actuarial Science, Business Management, Economics, Economics, Entrprnrship & Innovation Mgt, Entrepreneurship, Finance, Financial Planning, Human Resource Management, International Business, Law & Business, Legal Studies, Management Information Systems, Marketing, Real Estate, Risk Management and Insurance, Supply Chain Management, Statistical Sci + Data Analyt, Undeclared-Business & Mngt.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, FIN 3504, 'Y' in CRFI01, 'Y' in CRFI07, or 'Y' in CRFI02)

FIN 3512. Financial Modeling. 3 Credit Hours.

This course teaches how to apply Excel to capital budgeting and financial statement modeling for the purposes of forecasting and valuation. Students will learn how to calculate various project performance measures, construct financial statements from trial balances, develop financial statement forecasting models, and assess the sensitivity of the obtained results to forecasting assumptions. Other topics include bond valuation, beta analysis, and optimization methods. All techniques will be illustrated by applying them to real market data from Capital IQ and FactSet.

Field of Study Restrictions: Must be enrolled in one of the following Fields of study: Accounting, Actuarial Science, Business Management, Economics, Economics, Entrprnrship & Innovation Mgt, Entrepreneurship, Finance, Financial Planning, Human Resource Management, International Business, Law & Business, Legal Studies, Management Information Systems, Marketing, Real Estate, Risk Management and Insurance, Supply Chain Management, Statistical Sci + Data Analyt, Undeclared-Business & Mngt.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, FIN 3504, 'Y' in CRFI01, 'Y' in CRFI07, or 'Y' in CRFI02)

FIN 3513. Financial Statement Analysis. 3 Credit Hours.

This course teaches students to use and interpret economic and accounting information that is essential in financial analysis and valuation. By the end of the course, students should be able to use financial statements to evaluate a firm's performance, indicate key financial reporting issues, identify potential sources of financial statement manipulation, calculate and interpret financial ratios and their trends, and prepare a comprehensive financial assessment of a firm.

Field of Study Restrictions: Must be enrolled in one of the following Fields of study: Accounting, Actuarial Science, Business Management, Economics, Economics, Entrprnrship & Innovation Mgt, Entrepreneurship, Finance, Financial Planning, Human Resource Management, International Business, Law & Business, Legal Studies, Management Information Systems, Marketing, Real Estate, Risk Management and Insurance, Supply Chain Management, Statistical Sci + Data Analyt, Undeclared-Business & Mngt.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, FIN 3504, 'Y' in CRFI01, 'Y' in CRFI07, or 'Y' in CRFI02)

FIN 3514. Commercial Real Estate Analysis. 3 Credit Hours.

This course is designed to give students an understanding of activities and decisions that result in the man-made environment by introducing students to the complex world of commercial real estate analysis and development. Of primary interest are principles of sound development and the procedures and interactions of the analyst/developer that are necessary to coordinate with governmental officials, community leaders, and neighbors, while meeting the needs of users of commercial real estate space. Of importance is the integration of community preferences including environmental and sustainable development issues. An understanding of commercial real estate markets and development dynamics requires an understanding of real estate assets; complex urban dynamics; pertinent laws and regulations; the use of public and private financing; and the marketing of space within an urban context. Students should also develop the skills necessary to determine the requirements for the successful financial analysis of commercial real estate development including the forecasts of future cash flows and application of appropriate financial analysis techniques.

Field of Study Restrictions: Must be enrolled in one of the following Fields of study: Accounting, Actuarial Science, Business Management, Economics, Economics, Entrprnrship & Innovation Mgt, Entrepreneurship, Finance, Financial Planning, Human Resource Management, International Business, Law & Business, Legal Studies, Management Information Systems, Marketing, Real Estate, Risk Management and Insurance, Supply Chain Management, Statistical Sci + Data Analyt, Undeclared-Business & Mngt.

Course Attributes: SI

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, 'Y' in CRFI01, or 'Y' in CRFI07)

FIN 3515. Financial Markets and Institutions for Business. 3 Credit Hours.

This course provides finance majors with a survey of financial instruments (with a focus on fixed income and money markets), markets, and institutions with a strong current events perspective. The course will have an applied managerial perspective that focuses on both how the markets are viewed by companies who need access to funding as well as the professionals that work in the financial services industry. The course is intended not only for those interested in careers in financial markets and institutions, but also for those who wish to extend their institutional industry specific knowledge.

College Restrictions: Must be enrolled in one of the following Colleges: Business & Mngmnt, Fox School.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101 (may be taken concurrently), FIN 3901 (may be taken concurrently), 'Y' in CRFI01, or 'Y' in CRFI07)

FIN 3516. Corporate Valuation. 3 Credit Hours.

This course covers the valuation of public and private companies using discounted cash flow methods, market multiples, and hybrid models. Valuation techniques based on discounted cash flows include dividend discount models, free-cash flow models, and residual income models. Multiples-based methods use both market prices and enterprise values. The instructional format of the course is lecture supplemented with case analysis. The course extends the basic concepts of financial management beyond textbook fundamentals to practical applications. NOTE: Prior to Fall 2023, this course was titled "Advanced Corporate Finance."

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, 'Y' in CRFI01, or 'Y' in CRFI07)

FIN 3517. Financial Data Analysis. 3 Credit Hours.

This course applies the core materials in statistics and econometrics to the analysis of large financial data sets. The course covers three areas with intensive finance application: 1) statistical inference: distributions, hypothesis testing, confidence interval; 2) regression analysis: simple and multiple linear regressions, and probit/logit regression; and 3) big data and data mining: Monte Carlo simulation, and SQL. Students completing this course should be well prepared for the level of analysis required in the capstone for the asset pricing track.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, 'Y' in CRFI01, or 'Y' in CRFI07)

FIN 3518. Financial Technology. 3 Credit Hours.

This course provides a comprehensive introduction to the rapidly evolving field of Financial Technology (Fintech). Fintech encompasses a wide range of technologies and innovations in finance, which reshape the way businesses and individuals transact and invest. The course covers a variety of topics such as blockchain, digital payments, peer-to-peer lending, cryptocurrency, robo-advisors, algorithmic trading, and regulatory aspects of Fintech.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, 'Y' in CRFI01, or 'Y' in CRFI07)

FIN 3519. Wealth Management. 3 Credit Hours.

This course provides a comprehensive introduction to the principles and practices of personal financial planning and wealth management. The main topics include personal financial statements, investment strategies and vehicles, asset allocation, risk management, and various aspects of financial planning. In particular, students will learn about retirement, tax, and estate planning and education funding. Upon the completion of the course, students should be able to develop a comprehensive financial plan tailored to individual and family needs. NOTE: Prior to Fall 2024, this course was titled "Introduction to Financial Planning."

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, 'Y' in CRFI01, or 'Y' in CRFI07)

FIN 3523. Real Estate Financial Modeling. 3 Credit Hours.

The fundamentals of understanding real estate involve a combination of market conditions and economics, legal and environmental due diligence, marketing, and finance. The course is on real estate financial modeling, but will review the accompanying components involving legal and environmental due diligence. This course mixes theory and practice. The financial analysis occurs while obtaining and tracking an actual property. That property is proposed to be an apartment building, since a residential investment is the most likely that small investors can acquire. The class continues to examine real estate financial modeling, but with the use of Argus. The remainder of the class is on financing and capital structure for the project. These include remaining material on depreciation, amortization and loan financing, mezzanine and cash flow waterfalls.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, 'Y' in CRFI01, or 'Y' in CRFI07)

FIN 3524. Real Estate Finance and Mortgage Markets. 3 Credit Hours.

This course explores real estate finance and quantitative methods that are used in the valuation of real estate. Students develop an understanding of real estate financing and valuation as well as related topics such as underwriting, risk analysis, and financial leverage. In addition, students learn about the mortgage market including a review of the government-sponsored enterprises including Fannie Mae and Freddie Mac, and the securitization process for residential and commercial mortgages. The course includes analysis of both residential and commercial real estate markets. Students will be able to set up a term sheet to attract equity capital, prepare an offering memorandum for lenders to propose financing packages, and evaluate between competing loan proposals.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, 'Y' in CRFI01, or 'Y' in CRFI07)

FIN 3525. Real Estate Development. 3 Credit Hours.

This course evaluates ground-up development on vacant sites as well as rehabilitation, redevelopment, and acquisition investments. The course examines raw and developed land and the similarities and differences of traditional real estate product types including office, R & D, retail, warehouses, single family and multi-family residential, mixed use, and land as well as specialty uses like golf courses, assisted living, and fractional share ownership. Emphasis is on concise analysis and decision making. The course discusses the development process with topics including market analysis, site acquisition, due diligence, zoning, entitlements, approvals, site planning, building design, construction, financing, leasing, and ongoing management and disposition. Special topics like workouts and running a development company are discussed.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, 'Y' in CRFI01, or 'Y' in CRFI07)

FIN 3526. Commercial Credit Essentials. 3 Credit Hours.

This course will introduce you to commercial credit risk analysis undertaken by financial services firms. The topics range from financial statement analysis to loan structuring and detecting problem loans. Case studies are used extensively along with mini-assignments to reinforce the learning goals for each topic. The culmination of the course is a final case study exercise that is a turn-key underwriting exercise.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, 'Y' in CRFI01, or 'Y' in CRFI07)

FIN 3551. International Finance. 3 Credit Hours.

The course surveys theoretical and institutional aspects of international finance. Topics include the structure of global financial systems, foreign exchange markets, exchange rate risk management, and international corporate finance.

Field of Study Restrictions: Must be enrolled in one of the following Fields of study: Accounting, Actuarial Science, Business Management, Economics, Economics, Entrprnrship & Innovation Mgt, Entrepreneurship, Finance, Financial Planning, Human Resource Management, International Business, Law & Business, Legal Studies, Management Information Systems, Marketing, Real Estate, Risk Management and Insurance, Supply Chain Management, Statistical Sci + Data Analyt, Undeclared-Business & Mngt.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, FIN 3504, 'Y' in CRFI01, 'Y' in CRFI07, or 'Y' in CRFI02)

FIN 3571. Owl Fund Seminar. 3 Credit Hours.

This course offers students an immersive investment experience of managing the William C. Dunkelberg Owl Fund, a real-money equity fund. Students are assigned the roles of associate and lead analysts responsible for individual sectors within the S&P 500 index and conduct independent company research. Through this hands-on practice, students obtain valuable insights into the money management industry and hone analytical, collaboration, and communication skills highly coveted by employers. Students may register for this course only with the permission of the instructor.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, 'Y' in CRFI01, or 'Y' in CRFI07)

FIN 3580. Special Topics. 3 Credit Hours.

Special topics in the field of Finance.

College Restrictions: Must be enrolled in one of the following Colleges: Business & Mngmnt, Fox School.

Repeatability: This course may be repeated for additional credit.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, FIN 3504, 'Y' in CRFI01, 'Y' in CRFI07, or 'Y' in CRFI02)

FIN 3581. Field Experience in Finance. 3 Credit Hours.

This course allows finance majors to apply what they have learned in the classroom coupled with any professional skills they may have acquired in the workplace. The requirements of the course include: (1) an expectation that you can demonstrate a synthesis of finance concepts through the preparation of a final paper; (2) student responsibility to arrange meetings every other week with their faculty sponsor to track progress throughout the semester; and (3) a strong work ethic including self-motivation and self-discipline as well as an ability to meet deadlines is critical.

College Restrictions: Must be enrolled in one of the following Colleges: Business & Mngmnt, Fox School.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in (FIN 3504 or 'Y' in CRFI02) and (FIN 3507 or 'Y' in CRFI03)

FIN 3582. Independent Study. 1 to 6 Credit Hour.

Readings and/or research paper under the supervision of a faculty member.

Field of Study Restrictions: Must be enrolled in one of the following Majors: Finance, Real Estate.

College Restrictions: Must be enrolled in one of the following Colleges: Business & Mngmnt, Fox School.

Repeatability: This course may be repeated for additional credit.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, 'Y' in CRFI01, or 'Y' in CRFI07)

FIN 3671. Advanced Owl Fund Seminar. 3 Credit Hours.

This is the follow-on course to FIN 3571 (Owl Fund Seminar). Students continue managing the William C. Dunkelberg Owl Fund, deepen their understanding of equity investment strategies and portfolio management, and gain additional practical experience within a hands-on learning environment. Students may register for this course only with the permission of the instructor.

College Restrictions: Must be enrolled in one of the following Colleges: Business & Mngmnt, Fox School.

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C in FIN 3571.

FIN 3682. Independent Study. 1 to 6 Credit Hour.

Readings and/or research paper under the supervision of a faculty member.

Field of Study Restrictions: Must be enrolled in one of the following Majors: Finance, Real Estate.

College Restrictions: Must be enrolled in one of the following Colleges: Business & Mngmnt, Fox School.

Repeatability: This course may be repeated for additional credit.

Pre-requisites: Minimum grade of C in (FIN 3101, FIN 3901, 'Y' in CRFI01, or 'Y' in CRFI07)

FIN 3901. Honors Financial Management. 3 Credit Hours.

This course provides a survey of the financial problems associated with the life cycle of a business firm. Topics include: financial analysis and planning, capital budgeting, cost of capital, and the sources and uses of business funds. While the emphasis is on decision making within a corporate environment, the tools taught in this course are just as relevant to other forms of business organization and to personal financial management. Finance 3901 is the honors section of Finance 3101 and meets the FSBM Finance 3101 requirement.

Field of Study Restrictions: Must be enrolled in one of the following Fields of study: Accounting, Actuarial Science, Business Management, Construction Mgt Tech, Career and Technical Education, Economics, Economics, Entrprnrship & Innovation Mgt, Entrepreneurship, Finance, Financial Planning, Human Resource Management, International Business, Law & Business, Legal Studies, Management Information Systems, Marketing, Real Estate, Risk Management and Insurance, Supply Chain Management, Statistical Sci + Data Analyt, Undeclared-Business & Mngt.

College Restrictions: Must be enrolled in one of the following Colleges: Business & Mngmnt, Fox School.

Cohort Restrictions: Must be enrolled in one of the following Cohorts: SCHONORS, UHONORS, UHONORSTR.

Course Attributes: HO

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C- in (ECON 1101 or ECON 1901), (ECON 1102 or ECON 1902), (ACCT 2101 or ACCT 2103), and (STAT 2103 (may be taken concurrently), STAT 2903 (may be taken concurrently), STAT 2104 (may be taken concurrently), or MATH 3031 (may be taken concurrently))

FIN 3999. Honors Thesis I. 1 to 3 Credit Hour.

The first of a two-part sequence of courses in which independent research is conducted under the supervision of a thesis advisor from the Finance department resulting in a substantial piece of original research, roughly 30 to 50 pages in length upon completion of Finance 4999. The student must publicly present his/her findings at a Temple University Research Forum session or the equivalent during one of the two semesters during which these courses are undertaken.

Field of Study Restrictions: Must be enrolled in one of the following Majors: Finance.

College Restrictions: Must be enrolled in one of the following Colleges: Business & Mngmnt, Fox School.

Cohort Restrictions: Must be enrolled in one of the following Cohorts: SCHONORS, UHONORS, UHONORSTR.

Course Attributes: HO

Repeatability: This course may be repeated for additional credit.

FIN 4596. Seminar in Corporate Finance. 3 Credit Hours.

This course integrates the knowledge and skills obtained by students from other finance courses and teaches how to holistically apply them to real-world situations. The focus of the course is on financial decisions made by corporate executives. Using realistic cases, the students will learn how to perform financial analysis of a firm, compute a firm's cost of capital using publicly available data, value a firm using various methods, assess potential capital structure changes, and evaluate takeover alternatives. This is a writing intensive course that will help students further develop professional communication skills as well as satisfy the writing requirements for their degree.

Field of Study Restrictions: Must be enrolled in one of the following Majors: Finance.

College Restrictions: Must be enrolled in one of the following Colleges: Business & Mngmnt, Fox School.

Course Attributes: WI

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C (except where noted) in ((FIN 3504 and FIN 3507), (FIN 3504 and 'Y' in CRFI03), (FIN 3507 and 'Y' in CRFI02), or ('Y' in CRFI02 and 'Y' in CRFI03)) and (BA 2196 (C- or higher; may be taken concurrently) or BA 2996 (C- or higher; may be taken concurrently))

FIN 4597. Seminar in Real Estate Asset Analysis. 3 Credit Hours.

This course is designed to provide students with an integrative experiential learning opportunity in real estate finance that is an ideal preparation for entry into the workplace. It covers a variety of topics including the acquisition and cash flow analysis, lease analysis, asset and property management strategies, financing strategies, disposition strategies, federal income taxation issues, risk management strategies, and standard valuation techniques for commercial real estate. Over the semester, students work on a real estate project that requires a holistic application of the skills learned in the other courses. NOTE: FIN 4597 is the required capstone course for Real Estate majors. It is also a writing intensive course that helps students further develop business communication skills as well as satisfy the writing requirements for their degree.

Field of Study Restrictions: Must be enrolled in one of the following Majors: Real Estate.

College Restrictions: Must be enrolled in one of the following Colleges: Business & Mngmnt, Fox School.

Course Attributes: WI

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C (except where noted) in (FIN 3509 or 'Y' in CRFI04), (RE 3501 or 'Y' in CRRE01), and (BA 2196 (C- or higher; may be taken concurrently) or BA 2996 (C- or higher; may be taken concurrently))

FIN 4598. Seminar in Financial Planning. 3 Credit Hours.

This course integrates the knowledge obtained by students throughout their studies in six areas: fundamentals of financial planning, risk management, investments, income tax planning, retirement planning, and estate planning. Over the semester, students develop and present a financial plan for a hypothetical client that requires a holistic application of the skills learned in the other financial planning courses. NOTE: FIN 4598 is the required capstone course for Financial Planning majors. It is also a writing intensive course that helps students further develop professional communication skills as well as satisfy the writing requirements for their degree.

Course Attributes: WI

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C (except where noted) in (FIN 3507 or 'Y' in CRFI03), (FIN 3519 or 'Y' in CRFI05), and (BA 2196 (C- or higher; may be taken concurrently) or BA 2996 (C- or higher; may be taken concurrently))

FIN 4696. Seminar in Investment Analysis. 3 Credit Hours.

This course integrates the knowledge and skills obtained by students from other finance courses and teaches how to holistically apply these to real-world situations. The focus of the course is on investing in financial markets. Through realistic cases, students learn how to value stocks using fundamental and technical analysis, perform asset allocation, and evaluate a fund manager's performance. Over the semester, students complete their own investment research project that requires statistical techniques to analyze large financial data sets. This is a writing intensive course that helps students further develop professional communication skills as well as satisfy the writing requirements for their degree.

Course Attributes: WI

Repeatability: This course may not be repeated for additional credits.

Pre-requisites: Minimum grade of C (except where noted) in (FIN 3101, FIN 3901, 'Y' in CRFI01, or 'Y' in CRFI07), (FIN 3504 or 'Y' in CRFI02), (FIN 3507 or 'Y' in CRFI03), and (BA 2196 (C- or higher; may be taken concurrently) or BA 2996 (C- or higher; may be taken concurrently))

FIN 4999. Honors Senior Thesis II. 1 to 3 Credit Hour.

Independent research conducted under the supervision of a thesis advisor from the Finance Department resulting in a substantial piece of original research, roughly 30 to 50 pages in length. Student must publicly present his/her findings at a Temple University Research Forum session or the equivalent if this was not done in Finance 3999.

Field of Study Restrictions: Must be enrolled in one of the following Majors: Finance.

College Restrictions: Must be enrolled in one of the following Colleges: Business & Mngmnt, Fox School.

Cohort Restrictions: Must be enrolled in one of the following Cohorts: SCHONORS, UHONORS, UHONORSTR.

Course Attributes: HO

Repeatability: This course may be repeated for additional credit.

Pre-requisites: Minimum grade of C- in FIN 3999.