Finance (FIN)

FIN 1060 **SS**
Personal Finance
3

Designed as elective credit toward a business degree and for individuals interested in acquiring personal financial planning skills. Covers personal financial management with emphasis on decision making, budgeting, financial institutions, personal and family risk management, credit management, and estate planning. Methods include lectures, guest speakers, films, tapes, computer simulations and research. Completers should be able to prepare complete personal budgets and other family financial planning instruments. Lab access fee of $25 for computers applies. Canvas Course Mats $66/Wiley applies.

FIN 3020
Family Financial Management and Development
3
* Prerequisite(s): MAT 1030 or higher and University Advanced Standing

Personal and family financial management and development for non PFP Majors. Focuses on norms, roles, values, and traditions for the management of family resources. Examines the interactions and best practices of individuals and family members in processing financial management issues such as goal definitions, budgeting, debt management, and related functions.

FIN 3060
Introduction to the PFP Profession
3
* Prerequisite(s): MATH 1050 or MATH 1055 or MATH 1090 and University Advanced Standing

Introduces the processes appropriate for entry into the personal financial planning (PFP) profession. Provides an overview of the skills and knowledge sets required to be a PFP professional including an outline of business models and practice management issues within the industry. Includes a review of basic PFP process such as the time value of money, cash and debt management, personal financial statement analysis, education funding, and related issues.

FIN 3100
Principles of Finance
3
* Prerequisite(s): (MGMT 2340 or STAT 2040 or STAT 2050) and (ACC 2110 or ACC 2020 or ACC 3000) and University Advanced Standing

Examines financial management in the business environment; time value of money; fundamentals of security valuation; the capital asset pricing model and capital budgeting. Introduces finance terminology and quantitative techniques used in financial analysis. Covers financial ratios and financial statement analysis, cost of capital, working capital policies, dividend policy, and a brief overview of international finance. Lab access fee of $25 for computers applies. Canvas Course Mats $78/Cengage applies.

FIN 3150
Financial Management
3
* Prerequisite(s): FIN 3100 and University Advanced Standing
* Prerequisite(s) or Corequisite(s): MGMT 3345

Examines financial aspects of firm decisions; presents theoretical underpinings for financial management, together with quantitative techniques used to analyze financial questions. Covers financial analysis and planning; valuation methods; determination of required return; effect of capital structure decisions; funding alternatives; and corporate risk management. Requires analysis of a capital budgeting problem, including a written paper, quantitative analysis and presentation. Lab access fee of $25 for computers applies. Canvas Course Mats of $85/McGraw applies.

FIN 3160
Financial Management for Accounting Majors
3
* Prerequisite(s): FIN 3100, MATH 1050, MATH 1055, or MATH 1090, and University Advanced Standing

Prepares accounting majors with the information and skills necessary to prepare for the certified management accounting (CMA) accreditation process. Includes coverage of financial statement analysis, evaluation of profitabililty, managing financial risk, management of capital issues, and other financial decision making processes.

FIN 3170
Financial Statement Analysis
3
* Prerequisite(s): FIN 3100 and University Advanced Standing
* Prerequisite(s) or Corequisite(s): MGMT 3345

Teaches the application of professional financial management processes required to analyze markets, sectors, obtaining experience with optimization, data analysis, and quantitative techniques appropriate to be successful in the profession. Promotes the skills necessary to determine the value of firms assets and the worth of those assets in financial markets.

FIN 3200
Financial Counseling
3
* Prerequisite(s): FIN 3060 and University Advanced Standing. For PFP Majors Only

Prepares students to be effective financial counseling practitioners. Trains students to begin their role as effective financial counselors and planners. Develops counselor and client relationships skills as well as communication techniques to help identify and assist clients in an integrated financial planning environment. Provides an overview of the learning process needed to recognize the financial issues and concerns of many individuals and families and how to appropriately recommend solutions to help clients help themselves, while focusing on counselor sincerity and effectiveness in client reality.

FIN 3220
Risk Management and Insurance
3
* Prerequisite(s): University Advanced Standing, and For PFP Majors Only.
* Prerequisite(s) or Corequisite(s): FIN 3060

Examines risk management and insurance planning for individual clients as well as employers of small corporations. Teaches the development of risk management and insurance plans with economic and behavioral theory. Uses a case study approach to apply and integrate the material. Emphasizes evaluation of financial alternatives. Provides learning activities that facilitate growth and development in written and oral communication skills.

FIN 3400
Investment Management
3
* Prerequisite(s): FIN 3100 and University Advanced Standing

Overviews the field of investments. Introduces stocks, bonds, put and call options, commodity and financial futures. Emphasizes both theory and practical aspects of investment management. Includes security valuation, market hypothesis, capital asset pricing, strategies of portfolio construction, performance measures, and risk/return relationships. Lab access fee of $25 for computers applies.

FIN 3410
Introduction to Venture Capital Skills
3
* Prerequisite(s): University Advanced Standing, FIN 3100 strongly recommended.

Uses cases, supplemented with classroom instruction, to illustrate the various forms of financing a company can obtain. Provides insight into identifying and assessing investable opportunities using both qualitative and quantitative methods. Prepare students for more advanced coursework in venture capital and for professional roles after graduation in venture capital and private equity.

FIN 342R
Wolverine Fund
3
* Prerequisite(s): FIN 3410, Instructor Approval and University Advanced Standing, FIN 3100 strongly recommended.

Provides a hands-on learning experience in venture capital. Provides opportunity alongside syndicate partners for investment of Wolverine Fund monies in current venture capital deals. Uses evaluation methods including market, cash flow and hybrid methods, as well as various data sources, to analyze a company's financial statements and predict future growth. Builds skill in constructing basic financial models and forecasting to evaluate the investable nature of a business. May be repeated for a maximum of 6 credits toward graduation.

FIN 4020
Enterprise Risk Management
3
* Prerequisite(s): FIN 3100, MGMT 2340, and University Advanced Standing

Introduces the risks and exposures to loss which affect businesses and non-profit entities. Includes pure, financial, operational, and strategic risk. Emphasizes data collection, analysis, and evaluation methods. Provides an in-depth examination of risk management program objectives and goals. Provides the tools for identification and treatment.

FIN 4030
Foundations of Risk Management and Insurance
3
* Prerequisite(s): FIN 3100, MGMT 2340, and University Advanced Standing

Introduces fundamental risk management and insurance principles as essential components of global business operations and personal risk management. Provides an in-depth examination of risk identification, risk analysis, global risk exposures, insurance company operations, legal principles, loss prevention and safety concepts, and the social and economic relevance of risk management and insurance.

FIN 4040
Business Law for Insurance Professionals
3
* Prerequisite(s): FIN 3100, MGMT 2340, and University Advanced Standing

Introduces the fundamentals of insurance law. Provides an in-depth examination of the definition of insurance, risk and the nature of the insurance relationship, insurable interests, indemnity, fortuity, and subrogation. Studies the coordination of benefits, interpretation of policies, rights at variance with policy provisions, contract formation, warranties, misrepresentation and concealment, conditions, agents and brokers, insurance regulation, and introduction to insurance coverage.

FIN 4050
Commercial Property Risk Management and Insurance
3
* Prerequisite(s): FIN 3100, MGMT 2340, and University Advanced Standing

Introduces commercial property risk management, with an emphasis on risk control, risk financing and using insurance as an essential component of an enterprise risk management program. Provides an in-depth examination of risk assessment, loss prevention, and the treatment of risk and insurance in the areas of commercial property, loss of business income, cyber risk, and equipment breakdown.

FIN 4060
Commercial Liability Risk Management and Insurance
3
* Prerequisite(s): FIN 3100, MGMT 2340, and University Advanced Standing

Introduces business liability exposures to risk and loss arising from negligence and/ or other legal doctrines. Examines insurance as an essential component of an enterprise risk management program. Provides an in-depth examination of risk assessment, loss prevention, and treatment of risk in the areas of general liability, business auto, worker's compensation, cyber risk, and management and professional liability.

FIN 4100
Management of Financial Institutions
3
* Prerequisite(s): FIN 3100 and University Advanced Standing

Studies the U.S. financial system and its primary institutions and markets. Includes the role of the Federal Reserve System, American and international financial markets. Explores the impact of monetary policy on financial institutions and financial intermediation. Presents the term structure of interest rates, money, capital and mortgage markets, and management of thrift institutions and insurance companies. Lab access fee of $25 for computers applies.

FIN 4160
Portfolio Management
3
* Prerequisite(s): FIN 3400 and University Advanced Standing
* Prerequisite(s) or Corequisite(s): MGMT 3345

Examines portfolio theory and applied techniques used in selecting appropriate securities and managing the risk and return of a portfolio, with a focus on meeting investment objectives. Considers both stock and bond portfolios, and includes discussion of market efficiency, diversification, measurement of risk and of performance, bond duration and portfolio immunization, advanced bond pricing principles, bond swaps, term structure of interest rates, asset allocation, and portfolio hedging strategies.

FIN 4170
Derivative Securities
3
* Prerequisite(s): FIN 3100 and University Advanced Standing
* Prerequisite(s) or Corequisite(s): MGMT 3345

Covers characteristics and institutional information about derivative securities, including forward and futures, options and swaps. Examines pricing models for these securities, risk inherent in derivative investments, and the role of derivatives in risk management. May include discussion of real options and other topics dealing with financial engineering.

FIN 4180
International Finance Management
3
* Prerequisite(s): FIN 3100 and University Advanced Standing

Examines financial aspects of firms operating in an international business environment. Includes currency valuation and forecasting; international flow of funds; foreign and international capital markets; valuation of multinational enterprises; and the effect of decisions about structure of the business and its transactions on firm value; and management of currency, political, and other risks arising from multinational operations. Canvas Course Mats of $85/McGraw applies. Lab access fee of $25 for computers applies.

FIN 4185
International Trade and Finance
3
* Prerequisite(s): FIN 3100 and University Advanced Standing

Examines aspects of trade and finance in an international business environment. Includes firm and currency valuation and forecasting; international flow of funds; foreign and international trade and capital markets; valuation of multinational enterprises; and the effect of decisions about structure of trade agreements and international supply chains on firm value, and management of trade, currency, political, and other risks arising from multinational operations.

FIN 4190
Applied Asset Diversification and Management
3
* Prerequisite(s): FIN 3400 and University Advanced Standing

Teaches a wide variety of investment asset classes including performance measurement, analysis of portfolio investment assets, quantitative analyses of investment portfolios. Discusses complex investment concepts through simplification and modeling of these issues to help clients better understand the benefits of these investment concepts.

FIN 4200
Financial Counseling Practicum
3
* Prerequisite(s): FIN 3060, FIN 3200, Instructor Approval, Matriculation into WSB, and University Advanced Standing

Examines financial counseling with an engaged and practical focus. Uses actual client data in a supervised environment to integrate the material and core learning objectives, then apply them to financial counseling situations. Emphasizes the evaluation of credit and debt management, housing decisions and budgeting and forecasting. Provides learning activities designed to facilitate student growth and development in written, oral and presentation skills. Works with local practitioners to provide an engaged learning experience.

FIN 4250
Personal Financial Planning Practicum
3
* Prerequisite(s): FIN 3200, FIN 5210, FIN 5260, FIN 3220, FIN 3400, ACC 3400, and University Advanced Standing

Examines practice management in various financial planning firms. Teaches the basics of practice management with an understanding of the core areas of personal financial planning. Uses a case study approach to apply and integrate the material and evaluate financial alternatives. Emphasizes the benefits and drawbacks of various management methods. Provides learning activities that will facilitate student growth and development in written and oral communication skills.

FIN 4270
Wealth Management Seminar
3
* Prerequisite(s): FIN 3060, FIN 3100, and FIN 3400, Matriculation into the Woodbury School of Business, University Advanced Standing, and for PFP Majors Only.

Introduces investment theory, literature and theories which describe the unique process of household investment decision making. Introduces quantitative investment analysis and the instruments used to construct an efficient household portfolio. Uses quantitative and theoretical material which will require a basic knowledge of economics and finance, and the ability to work with spreadsheets. Applies practical concepts to prepare students to work as wealth managers in financial planning firms.

FIN 4290
Technological Applications in Personal Financial Planning
3
* Prerequisite(s): FIN 3060, WSB matriculation, University Advanced Standing, and For PFP Majors Only.

Introduces various financial planning software packages. Includes both goal based and cash flow based financial planning software, client relationship management software, investment research software, portfolio management software, and office support software. Provides access to a variety of premier software companies in the U.S. and Canada. Certification in core software packages is required. Includes training material and standards as outlined by software companies.

FIN 4310
Real Estate Investment and Securities
3
* Prerequisite(s): FIN 3100 and University Advanced Standing

Examines real estate investments and debt and equity capital markets linked to real estate assets. Focuses primarily on real estate investments and valuation of debt and equity securities, including commercial and residential mortgages, real estate investment trusts, and mortgage-backed securities, and some related instruments such as CDOs. Examines the process of securitization and the secondary markets for real estate securities, together with the role of financial institutions in this sector. Provides an overview of real estate investment, measurement of prices, and fundamental determinants of value with particular attention given to the effect of interest rate risk, default risk, and the embedded prepayment options on the value of mortgages and mortgage-backed securities.

FIN 457R
Advanced Topics in Finance
3
* Prerequisite(s): FIN 3100, Instructor Approval, and University Advanced Standing

Uses case method, examination of current academic and professional literature and/or student research to explore selected finance topics in considerable detail. Emphasizes student analysis, exposition and presentation of information. May be repeated four times for a maximum of 12 credits toward graduation.

FIN 4600
AFC Examination Preparation
3
* Prerequisite(s): FIN 3200 and (FIN 1060 or FIN 3060), and University Advanced Standing

Prepares Personal Financial Planning students to sit for the Accredited Financial Counselor (AFC®) accreditation exam. Provides a review of the concepts and issues students need to be successful, including financial counseling, personal finance, and debt management.

FIN 481R
Personal Financial Planning Internship
2 to 8
* Prerequisite(s): Departmental Approval and University Advanced Standing

Provides supervised, practical, and professional experience for students preparing for careers in Personal Financial Planning. May be repeated for a maximum of 8 credit hours. May be graded Credit/No Credit.

FIN 482R
Internship
2 to 8
* Prerequisite(s): Instructor Approval and University Advanced Standing

For upper-division students in Finance. Provides a transition from school to work where learned theory is applied to actual practice through meaningful on-the-job paid experience commensurate with upper-division classroom instruction. Includes student, employer, and coordinator evaluations, on-site work visits, written assignments, and oral presentations. Completers should obtain experience in establishing and accomplishing individualized work objectives that improve work performance. May be repeated for 6 credits toward graduation. May be graded credit/no credit.

FIN 483R
Colloquium in PFP Professionalism
1
* Prerequisite(s): University Advanced Standing and For PFP Majors Only.

Prepares PFP Program students for internships and other professional development activities. Features industry professionals who interact with students and discuss opportunities within the industry and their specific professional practices. Covers special topics such as business etiquette, dressing for success, preparing professional resumes, correspondence, etc. May allow students to experience extended personal interaction with visiting professionals by hosting them, providing transportation to/from the airport, escorting them to local points of interest, and more. May be repeated for a maximum of 3 credits toward graduation.

FIN 5130
Financial Statement Analysis and Modeling
3
* Prerequisite(s): FIN 3100

Explains the relationships among the three primary financial statements including income statement, balance sheet, and cash flow statements. Analyzes companies in three primary sectors and does reviews and valuations of these companies. Describes basic merger, acquisition, and initial public offering valuation concepts.

FIN 5160
International Financial Management
3
* Prerequisite(s): FIN 3100

Translates financial topics within an international perspective. Teaches international corporate finance transactions and the impact of currency implications on company financial translations. Provides a global context for cultural differences of financial concepts and practices in varied countries. Provides additional financial perspectives about international business transactions within the context of earlier financial courses.

FIN 5170
Investment Analysis and Portfolio Analysis
3
* Prerequisite(s): FIN 3100

Provides an introduction to the global securities market and its role in capital formation, wealth-creation, economic development, risk mitigation, wealth management, and other finance-related goals.

FIN 5180
CFA Examination Preparation
3
* Prerequisite(s): Permission of instructor or department chairr

Prepares participants to sit for the Chartered Financial Analysis (CFA) Level 1 section of the exam. Requires students to work through a modular process covering outlined topics required for the exam including ethics, quantitative methods, economics, corporate finance, financial reporting/analysis, security analysis, and portfolio management.

FIN 5210
Retirement Planning
3
* Prerequisite(s): FIN 3060, Matriculation into the Woodbury School of Business, University Advanced Standing, and For PFP Majors Only.

Examines the topics of retirement planning and retirement plans from both employer and individual client settings. Uses a case study approach to apply and integrate the material. Emphasizes the evaluation of financial alternatives. Provides learning activities that will facilitate student growth and development in written and oral communication skills.

FIN 5260
Estate Planning Fundamentals
3
* Prerequisite(s): FIN 3060, Matriculation into the Woodbury School of Business, University Advanced Standing, and For PFP Majors Only.

Teaches gift, estate, and generation skipping transfer taxation, including financial and estate planning applications. Applies gift, estate, and generation skipping transfer taxation rules to personal financial planning scenarios. Studies financial regulations and taxation policy. May be delivered hybrid.

FIN 5300
Tax Planning for Personal Financial Planners
3
* Prerequisite(s): FIN 3060, Matriculation into WSB, University Advanced Standing, and for PFP majors only

Examines the topic of income tax planning and forecasting for individual clients and small business owners. Uses a case study approach to integrate the material and apply it to personal financial planning situations. Emphasizes the evaluation of financial alternatives. Provides learning activities that will facilitate student growth and development in written and oral communication skills. Works with local practitioners to provide an engaged learning experience.

FIN 5510
Investment Products
3
* Prerequisite(s): Permission of instructor or department chair and University Advanced Standing

Helps students prepare for the CFA Level I exam by analyzing investment products. Defines major investment and sub-types of equity investments, fixed income investments, derivatives, and alternative investments. Introduces essential features and related risks of investment products.

FIN 5520
Financial Markets
3
* Prerequisite(s): Permission of instructor or department chair and University Advanced Standing

Analyzes fundamental economic concepts, including market structures and business cycles. Examines corporate governance, stakeholder management, and capital structure. Explores the role ethics and professionalism play in the investment industry.

FIN 5700
CFP Examination Preparation
3
* Prerequisite(s): FIN 3060, FIN 3220, FIN 3400, FIN 5210, FIN 5260, FIN 5300 and University Advanced Standing
* Prerequisite(s) or Corequisite(s): FIN 5800

Prepares personal financial planning students completing his/her bachelor of science degree who are planning to take the Certified Financial Planner accreditation exam. Provides review of the concepts and issues individuals need to be successful. Uses Dalton Education materials.

FIN 5800
Personal Financial Planning Capstone
3
* Prerequisite(s): FIN 3060, FIN 5210, FIN 3220, FIN 5260, FIN 3400, University Advanced Standing, and For PFP Majors Only.

Develops the concept of a comprehensive plan. Reviews each of the major aspects of financial planning in the context of a comprehensive case. Analyzes the financial planning profession and the various types of financial planning models. Provides an overview of software applications as well as interview skills, data gathering, working with clients, presentation skills, and the creation of a comprehensive financial plan.

FIN 6060
Financial Planning for Professionals
3
* Prerequisite(s): Admission into any graduate program in the Woodbury School of Business

Provides an overview of personal financial planning. Presents a framework for how financial planners assist clients in effectively planning to achieve their goals. Applies financial concepts to households, including time value of money, capital needs analyses, and risk management. Examines concepts related to education funding, insurance products, and professional ethics.

FIN 6130
Financial Statement Analysis and Modeling
3
* Prerequisite(s): Admission into any graduate program in the Woodbury School of Business

Develops fluency with the three primary financial statements including income statement, balance sheet, and cash flow statement. Projects statements for companies in three primary sectors and conducts a full enterprise valuation for projected companies. Conducts a mock merger, acquisition, and initial public offering valuation.

FIN 6140
Regulatory Policy in Financial Services
3
* Prerequisite(s): Admission into any graduate program in the Woodbury School of Business

Describes the functions and purposes of regulatory policy within the financial services industry. Outlines alternative philosophies which influence regulatory policy development including implementation of public policy for these purposes. Reviews varied government, industry, and other agencies responsible for regulatory policy in the financial service industry.

FIN 6150
Financial Management
3
* Prerequisite(s): Acceptance in the MBA program

Discusses corporate financial management cases and analyses dealing with problems of working capital management, capital budgeting, cost of capital evaluation, and corporate restructuring. Canvas Course Mats $78/ Cengage applies.

FIN 6160
International Financial Management
3
* Prerequisite(s): Admission into any graduate program in the Woodbury School of Business

Offers a financial perspective treating international business. Focuses on international corporate finance transactions and the currency implications of financial statement translations. Provides a global context for cultural differences of financial concepts and practices around the world.

FIN 6170
Investment Analysis and Portfolio Analysis
3
* Prerequisite(s): Admission into any graduate program in the Woodbury School of Business

Provides an introduction to the global securities market and its role in capital formation, wealth-creation, economic development, risk mitigation, wealth management, and other finance-related goals. Uses Bloomberg Terminals in the development of company and industry analyses. Canvas Course Mats $78/ Cengage applies.

FIN 6210
Retirement Planning
3
* Prerequisite(s): Admission into any graduate program in the Woodbury School of Business

Examines topics of retirement planning and retirement plans at the graduate level from both employer and individual client perspectives. Uses case study approach to apply and integrate the material. Emphasizes the evaluation of financial alternatives. Provides learning activities that will facilitate student growth and development in written and oral communication skills.

FIN 6260
Estate Planning
3
* Prerequisite(s): Admission into any graduate program in the Woodbury School of Business

Describes elements of estate planning including gift, estate, generation skipping, tax implications and other relevant issues financial planners need to identify client needs. Identifies planning concepts, tools, and varied processes important to meet needs of individual clients.

FIN 6300
Income Tax Planning
3
* Prerequisite(s): Admission into any graduate program in the Woodbury School of Business

Examines the topic of income tax planning and forecasting for individual clients and small business owners. Executes a case study approach to integrate material and apply it within a personal financial planning context. Implements materials to facilitate student growth and development in written and oral communication skills. Organizes activities with local practitioners to provide an engaged learning experience.

FIN 6340
Analytics and Advanced Statistics
3
* Prerequisite(s): Admission into any graduate program in the Woodbury School of Business

Describes processes and methods that statisticians use to analyze business, financial, and related issues. Teaches how to determine types of data required to address specific problems, how to gather, analyze, and report that information to suggest solutions to identified problems. Evaluates the effectiveness of varied statistical processes in applying those techniques to address specific types of issues. Practices the application of statistical methods to the evaluation of identified problems.

FIN 6350
Retirement Income Planning
3
* Prerequisite(s): Admission into the MFPA program in the Woodbury School of Business

Describes the special issues related to managing and sustaining retirement income for people depending on that source for livelihood. Evaluates alternative sources of income for retired individuals including social security, pensions, 401K, and other sources. Describes varied strategies for sustaining value, evaluating withdraws from principal, reviews of sustainability, and other related concepts.

FIN 6370
Wealth Management
3
* Prerequisite(s): Admission into the MFPA program in the Woodbury School of Business

Introduces investment theory, literature and theories relating to the unique processes of household investment decision making. Implements quantitative investment analyses and the instruments appropriate to the development of an efficient household portfolio. Teaches quantitative and theoretical concepts requiring a basic knowledge of economics, finance, and the ability to work with spreadsheets. Applies practical concepts to prepare students to work as wealth managers in financial planning firms.

FIN 6380
Advanced Estate Planning and Asset Protection
3
* Prerequisite(s): FIN 6260 recommended; admission into any graduate program in the Woodbury School of Business

Describes a variety of processes for evaluating asset values and paring those processes with client's requirements. Reviews alternative trust types, policies for achieving varied client objectives, and evaluating trust effectiveness.

FIN 6390
Financial Technology
3
* Prerequisite(s): Admission into any graduate program in the Woodbury School of Business

Provides an overview of financial software commonly used in financial planning and financial analytics. Evaluates software training processes. Introduces information technology used in financial services. Engages students in the process of financial technology system development.

FIN 6400
Managing Client Relationships
3
* Prerequisite(s): Admission into the MFPA program in the Woodbury School of Business

Outlines processes for developing and sustaining client relationships to manage a professional financial planning operation. Reviews alternative electronic applications designed to support client relationships. Evaluates the effectiveness of alternative client management systems including both strengths and challenges of such systems.

FIN 6450
Planning for Financial Planning Business Owners
3
* Prerequisite(s): Acceptance into the Masters of FPA Program

Reviews varied business organizations, structures, processes, and other related activities necessary to the effective management of a financial planning business. Evaluates client management, financial planning software, business and tax accounting software, and other needed technology support. Teaches professional development activities for planning professionals and staff. Analyzes marketing, human resources, and other business function processes. Integrates best business practices.

FIN 6510
CFA I Investment Products
3
* Prerequisite(s): Admission into any graduate program in the Woodbury School of Business

Helps students prepare for the CFA Level I exam by analyzing investment products. Defines major investment and sub-types of equity investments, fixed income investments, derivatives, and alternative investments. Introduces essential features and related risks of investment products.

FIN 6520
CFA I Financial Markets
3
* Prerequisite(s): Admission into any graduate program in the Woodbury School of Business

Analyzes fundamental economic concepts, including market structures and business cycles. Examines corporate governance, stakeholder management, and capital structure. Explores the role ethics and professionalism play in the investment industry.

FIN 6700
CFP Exam Preparation
3
* Prerequisite(s): FIN 6060, FIN 6170, FIN 6210, FIN 6300, and FIN 6260
* Prerequisite(s) or Corequisite(s): FIN 6800

Prepares personal financial planning students completing master's degree who are planning to take the Certified Financial Planner accreditation exam. Provides review of the concepts and issues individuals need to be successful.

FIN 679R
Special Topics in Finance
3
* Prerequisite(s): Admission into the MFPA program in the Woodbury School of Business

Reviews special topics such as new tax laws, revisions of charitable giving procedures, developing specialized trusts, changes in financial industry regulatory processes, and other related topics. May be repeated for a maximum of 6 credits toward graduation.

FIN 6800
Financial Planning Capstone and Case Analysis
3
* Prerequisite(s): FIN 6060, FIN 6170, FIN 6210, FIN 6300
* Prerequisite(s) or Corequisite(s): FIN 6260

Reviews each of the major aspects of financial planning in the context of a comprehensive case. Analyzes the financial planning profession and the various types of financial planning models. Provides an overview of client servicing and management, including data gathering, working with clients, presentation skills, and the creation of a comprehensive financial plan.

FIN 6810
CFA Exam Preparation
3
* Prerequisite(s): FIN 6510, FIN 6520
* Prerequisite(s) or Corequisite(s): FIN 6170, FIN 6340

Prepares participants to sit for the Chartered Financial Analysis (CFA) Level 1 section of the exam. Requires students to work through a modular process covering outlined topics required for the exam including ethics, quantitative methods, economics, corporate finance, financial reporting/analysis, security analysis, and portfolio management.

FIN 6820
Research Methods
3
* Prerequisite(s): Admission into the MFPA program in the Woodbury School of Business

Describes graduate level research methods, processes, and skills appropriate to the analysis of applied business projects. Reviews scientific methods analysis, research design, measurement and scaling, testing reliability and validity, communication of research results, and other relevant concepts.

FIN 6840
Behavioral Finance Seminar
3
* Prerequisite(s): Admission into any graduate program in the Woodbury School of Business

Explores how deviations from the classic model of rationality impact decision making processes and outcomes. Evaluates the assumptions of human decision making. Analyzes the various biases and heuristics that can influence decision-making, especially about financial decisions. Applies behavioral finance research to the practices of financial planning and financial analytics.

FIN 689R
Internship
1 to 6
* Prerequisite(s): Admission into any Woodbury School of Business graduate program.

Provides supervised, applied experience for students preparing for careers in finance and/or financial services. Facilitates opportunities to apply theory and other concepts to real-world scenarios. Includes student, employer, and coordinator evaluations, written assignments, and oral presentations. Facilitates opportunities for students to establish individualized work objectives designed to improve performance. Requires completion of an internship application. May be graded credit/no credit. May be repeated for a maximum of 6 credits toward graduation.

FIN 690R
Independent Study
1 to 3
* Prerequisite(s): Admission into any graduate program in the Woodbury School of Business

Provides independent study of topics within financial planning and/or analytics. Guides students with reading, individual projects, and other engagements at the discretion and approval of the instructor. May be repeated for a maximum of 3 credits toward graduation.