

FINANCIAL INVESTMENTS

Financial Investments Major

Coordinator: Dr. Dean Frear

Total minimum number of credits required for a Major in Financial Investments leading to the Bachelor of Science degree — 123.

The Financial Investments Major at Wilkes is constructed upon the Sidhu School's common foundation courses and the General Education requirements of the University. Financial Investment Majors begin their studies with [[FIN-240]]. Subsequent courses cover other topics such as investment management, long-term strategic financial planning, risk management and insurance, money and banking and personal finance

Common career paths for graduates in this major are in the fields of financial management, financial analysis, securities, commodities, financial services sales agents and personal financial advisors. For those considering an academic career, the major may lead to an MBA and/or doctoral program.

Requirements for the Financial Investments Major (30 credits total) Credits

Requirements (30 credits)	
[[FIN-201]] Personal Finance	3
[[FIN-219]] Financial Analysis	3
[[FIN-230]] Money and Banking	3
[[FIN-319]] Financial Derivatives	3
[[FIN-341]] Managerial Finance	3
[[FIN-342]] Property and Life Insurance	3
[[FIN-343]] Investments and Portfolio Management	3
[[FIN-345]] Long-Range Financial Planning	3
[[FIN-358]] International Finance	3
[[BA-419]] Quantitative Decision Making	3

Financial Investments Major- Required Courses and Recommended Course Sequence

First Semester Credits

[[BA-151]] Integrated Management Experience I	3
[[CS-115]] Computers and Applications	3
[[ENG-101]] Composition	4
[[FYF-101]] First-Year Foundations	3
[[HST-101]] Introduction of the Modern World	3
[[PPD-101]] Personal and Professional Development I	1
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Second Semester

[[BA-152]] Integrated Management Experience II	3
[[COM-101]] Fundamentals of Public Speaking	3
[[MTH-100]] Pre-Calculus	3
[[BA-119]] Data Analysis in Excel	3
[[ENG-120]] Reading Classical Traditions	3
	15

Third Semester

[[ACC-161]] Financial Accounting & Decision Making	3
[[MGT-251]] Management of Organizations & People	3
[[FIN-240]] Introduction to Finance	3
[[EC-101]] Principles of Economics	3
[[MTH-111]] Calculus I	3
[[PPD-201]] Personal and Professional Development III	1
	16

Fourth Semester

[[ACC-162]] Managerial Accounting & Decision Making	3
[[EC-102]] Principles of Economics II	3
[[FIN-230]] Money and Banking	3
[[MKT-221]] Marketing	3
[[FIN-341]] Managerial Finance	3
	15

Fifth Semester

[[FIN-343]] Investments and Portfolio Management	3
Science Distribution Requirement (Area II)	3
[[BA-335]] Law and Business	3
[[BA-319]] Business Statistics	3
[[FIN-219]] Financial Analysis	3
[[PPD-301]] Personal and Professional Development V	1
	16

Sixth Semester

[[BA-336]] Advanced Topics in Business Law	3
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Financial Investments

[[FIN-342]] Property and Life Insurance	3
[[FIN-319]] Financial Derivatives	3
[[FIN-201]] Personal Finance	3
Science Distribution Requirement (Area II)	3
Humanities Distribution Requirement (Area I)	3
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Seventh Semester

[[MGT-358]] International Business	3
[[BA-419]] Quantitative Decision Making	3
[[FIN-345]] Long Range Financial Planning	3
Social Science Distribution Requirement (Area III)	3
[[PPD-401]] Personal and Professional Development VII	1
	13

Eighth Semester

[[BA-461]] Business Strategy and Decision Making	3
[[FIN-462]] Professional Business Experience	3
[[FIN-358]] International Finance	3
Arts Distribution Requirement (Area IV)	3
[[BA-419]] Quantitative Decision Making	
	15

FIN. FINANCE

FIN-201. PERSONAL FINANCE

Credits: 3

Terms Offered: On Demand

This course in personal financial management is designed to help students understand and develop competence and confidence in using the knowledge and skill of the discipline of personal money management.

Students develop competence and confidence through reading about personal financial management and through working with problems and cases that include real life experiences with the subject. This course is designed to benefit business and non business majors.

FIN-219. FINANCIAL ANALYSIS

Credits: 3

This course is an introductory course on the fundamentals of financial analysis techniques. It aims to help students develop analytical skills for making investment decisions. Furthermore, it focuses on less well-established techniques and knowledge that is alien to and ignored by efficient market hypothesis (EMH) or modern portfolio theory (MPT). The emphasis is on: technical analysis, Microsoft Excel tools in a financial context and Bloomberg terminals.

Pre-Requisites

[[BA-119]], [[FIN-240]] with a minimum grade 2.0

FIN-230. MONEY & BANKING

Credits: 3

A study of money, credit, and banking operations. Monetary standards, development of the American monetary and banking system. Recent developments in other financial institutions. Central banking and the Federal Reserve System, instruments of monetary control, international monetary relationships. Cross-listed with [[EC-230]]

FIN-240. INTRODUCTION TO FINANCE

Credits: 3

This course introduces basic principles of finance including cash flow, financial ratios, time value of money, stock and bond valuation, capital structure and cost of capital.

FIN-319. FINANCIAL DERIVATIVES

Credits: 3

Financial securities and markets are changing rapidly. This course gives students an understanding of financial derivative instruments and their applications to corporate strategy and risk management. Students learn how the finance derivatives are priced and used in risk management and trading or speculative strategies by individuals and companies. We cover options, forwards, futures, and swaps to help our students to be better prepared to enter a career in finance.

Pre-Requisites

[[ACC-162]], [[BA-119]], [[FIN-240]], [[FIN-341]], [[FIN-343]] all with a minimum grade of 2.0

FIN-341. MANAGERIAL FINANCE

Credits: 3

This course provides advanced study of financial theories, decision-making models relating to: financial analysis and planning; working capital management; cash budgeting; capital asset acquisitions; capital asset financing; cost of capital; capital structuring; acquisitions; divestitures; and reorganizations.

Pre-Requisites

[[FIN-240]] with a minimum grade of 2.0

FIN-342. PROPERTY AND LIFE INSURANCE

Credits: 3

A study of principles of life, health, property, and liability insurance applied to the needs of individuals and organizations.

Pre-Requisites

[[FIN-341]] with a minimum grade of 2.0

FIN-343. INVESTMENTS AND PORTFOLIO MANAGEMENT**Credits:** 3

A survey of the features and characteristics of investment instruments, the operation and regulation of security markets, the techniques of security analysis and valuation, financial intermediaries, and modern and traditional portfolio theory and management.

Pre-Requisites

[[FIN-240]] with a minimum grade of 2.0

FIN-345. LONG-RANGE FINANCIAL PLANNING**Credits:** 3

A survey of the tools and techniques currently employed by financial decision-makers when evaluating organizational performance and developing future courses of action. Emphasis will be placed upon long-range planning and capital budgeting techniques.

Pre-Requisites

[[FIN-341]] and [[FIN-343]] with a minimum grade of 2.0

FIN-358. INTERNATIONAL FINANCE**Credits:** 3

This course will provide the conceptual framework necessary for financial decision-making in a multinational corporation (mnc). We focus on implementing analytical tools and theory through problems and analysis of real-world global decision-making. Students explore the following traditional areas of corporate finance: investments, capital budgeting, cost of capital, capital structure, evaluation and control of operations, merger and acquisition, and risk management from a global perspective.

FIN-397. SEMINAR**Credits:** 1-3

One to three credits