

DEPARTMENT OF FINANCE

Alex Petkevich, Chair

The Finance Department offers majors in Finance and Financial Services. Each major offers its own unique set of tracks leading to satisfying careers. These programs cover a broad range of topics starting from corporate budget decisions and investments to real estate valuation and insurance. This wide foundation and practice-oriented educational experience equip students with skills necessary for successful careers in the industry. Finance graduates are qualified for careers including investment and commercial banking, investment fund managers, corporate treasurers, financial controllers, chief financial officers, risk managers, investment analysts, financial advisers, commercial real estate analysts, and others.

Degree Offered

- BBA Finance (<http://utoledo-public.courseleaf.com/undergraduate/business-innovation/department-finance/bba-finance/>)
- BBA Financial Services (<http://utoledo-public.courseleaf.com/undergraduate/business-innovation/department-finance/bba-financial-services/>)

FINA 2000 Personal Investing

[3 credit hours]

This course features a real time stock market simulation. Students will be able to trade securities and track their performance throughout the semester. Learn about different types of investments including: stocks, bonds, mutual funds, real estate, options, and futures. Not applicable toward finance major.

Term Offered: Spring, Summer, Fall

FINA 3060 Personal Finance

[3 credit hours]

This course covers the fundamentals of personal finance and will help you make informed decisions in your financial future. Topics included: how to manage credit, planning for retirement, mortgages and home ownership, understanding life insurance, types of mutual funds, personal taxation principles, how loans work, and estate planning. Not applicable toward finance major.

Term Offered: Spring, Summer, Fall

FINA 3480 Investments

[3 credit hours]

This course introduces history of risk-returns trade-off, investment process, different investment securities and financial markets in which financial assets traded. In addition, modern portfolio theory, risk-return trade-off, and performance evaluation are explained in detail.

Prerequisites: BUAD 3040 with a minimum grade of C

Term Offered: Spring, Summer, Fall

FINA 3500 International Business Finance

[3 credit hours]

Examines the role of a financial manager in international transactions. The international environment and the role of international asset markets are emphasized.

Prerequisites: BUAD 3040 with a minimum grade of D-

Term Offered: Spring, Summer, Fall

FINA 3600 Risk Management

[3 credit hours]

Investigates non-speculative risks and the methods used to deal with them. Emphasizes on the insurance mechanism. Explores the functional aspect of the insurance operations.

Prerequisites: BUAD 3040 with a minimum grade of D-

Term Offered: Summer, Fall

FINA 3610 Life And Health Insurance

[3 credit hours]

Combines a discussion of the economic aspects of life and health insurance with basic analysis on life insurance, health and annuity contracts. Includes investigation of major functional aspects.

Prerequisites: BUAD 3040 with a minimum grade of D-

Term Offered: Spring, Fall

FINA 3660 Real Estate Principles, Practices And Finance

[3 credit hours]

A basic discussion in real estate economics, valuation theory, transfer procedures, legal characteristics, brokerage, taxation and financing techniques. Emphasis on residential properties. A term project is required.

Prerequisites: BUAD 3040 with a minimum grade of D-

Term Offered: Fall

FINA 3670 Real Estate Valuation

[3 credit hours]

Methodology of appraising large and small commercial real properties and the theory underlying appraisal techniques and valuation. A term project is required.

Prerequisites: BUAD 3040 with a minimum grade of D-

Term Offered: Spring

FINA 3680 Real Estate Law, Insurance And Taxes

[3 credit hours]

An integrative analysis of real estate, insurance, taxes and legislation as they impact commercial real estate ownership returns and risk. A term project is required.

Prerequisites: BUAD 3040 with a minimum grade of D-

Term Offered: Spring, Fall

FINA 3890 Financial Modeling with Excel

[3 credit hours]

This course help students develop spreadsheet modeling skills necessary to evaluate common financial problems encountered. The course provides hands-on experience in obtaining financial data and using Excel to manipulate and analyze data for a wide variety of subjects in finance.

Prerequisites: BUAD 3040 with a minimum grade of C

Term Offered: Spring, Summer, Fall

FINA 4080 Intermediate Financial Management

[3 credit hours]

This course explores corporate financial decision making in depth. Topics include financial statement analysis, financial planning, capital budgeting, working capital management, and capital structure.

Prerequisites: BUAD 3040 with a minimum grade of C

Term Offered: Spring, Summer, Fall

FINA 4090 Financial Markets And Institutions

[3 credit hours]

The course explores operations and functions of financial markets and institutions. The emphasis is on the interest rate theory, the role of the Federal Reserve System and the government in establishing monetary policy and providing regulation, management of institutions, and internationalization.

Prerequisites: BUAD 3040 with a minimum grade of C**Term Offered:** Spring, Summer, Fall**FINA 4100 Security Analysis & Portfolio Management**

[3 credit hours]

Emphasizes the importance of portfolio management techniques and evaluation. Techniques of financial statement analysis, economic analysis, industry analysis, theoretical issues of efficient markets, technical analysis and fundamental analysis.

Prerequisites: BUAD 3040 with a minimum grade of C**Term Offered:** Spring, Fall**FINA 4200 Fixed Income Securities**

[3 credit hours]

This course explores the fixed income securities markets, institutions, and instruments. We will analyze the pricing, risks, and risk management of fixed income securities.

Prerequisites: BUAD 3040 with a minimum grade of C**Term Offered:** Spring**FINA 4340 Derivatives Securities and Markets**

[3 credit hours]

This course explores the derivative securities markets and instruments. It covers the valuation, risks, and risk management aspect of derivative securities.

Prerequisites: BUAD 3040 with a minimum grade of C**Term Offered:** Spring, Fall**FINA 4480 Student Managed Portfolio Practicum**

[1-3 credit hours]

Course provides selected students active portfolio management training utilizing an endowed portfolio. Student Portfolio Managers apply equity selection analysis and portfolio risk analytics, with fiduciary responsibilities.

Prerequisites: FINA 3480 with a minimum grade of C**Term Offered:** Spring, Fall**FINA 4670 Advanced Financial Management**

[3 credit hours]

Applies financial analysis techniques to real-world problems using computer simulations and case studies. Topics include capital budgeting, working capital management, cost of capital, capital structure, leasing, valuation of levered firms, and options.

Prerequisites: FINA 3480 with a minimum grade of D- and FINA 4080 with a minimum grade of D-**Term Offered:** Spring, Summer, Fall**FINA 4840 Small Business Financial Policies And Practices**

[3 credit hours]

Financial management and planning in small and medium-sized firms.

Course focuses on the financial analysis and management of their problems, policies, practices and funding requirements.

Prerequisites: BUAD 3040 with a minimum grade of C**Term Offered:** Spring, Summer, Fall**FINA 4870 Advanced Financial Institutions & Markets**

[3 credit hours]

Seminar focusing on current issues in financial institutions and services management.

FINA 4880 Real Estate Property Management

[3 credit hours]

Methodology of managing large and small commercial properties and buildings to maximize current earnings, earnings potential and asset value for the property owners.

Prerequisites: (BUAD 3040 with a minimum grade of D- and FINA 3670 with a minimum grade of D- and FINA 3680 with a minimum grade of D-)**FINA 4890 Financial And Estate Planning**

[3 credit hours]

Nature and methods of Financial planning. Creation, conservation and distribution of estates. Emphasis is on investments, insurance wills, trusts and tax laws.

Prerequisites: BUAD 3040 with a minimum grade of D-**Term Offered:** Spring**FINA 4900 Seminar In Finance**

[3 credit hours]

Seminar course in advanced and specialized topics. Current readings from finance journals. Written paper required.

Prerequisites: (FINA 3480 with a minimum grade of D- and FINA 4080 with a minimum grade of D-)**Term Offered:** Spring, Fall**FINA 4940 Finance Internship**

[1-3 credit hours]

This course explores special topics in the field of finance in detail. Topics varies and chosen as need required.

Prerequisites: BUAD 3040 with a minimum grade of D-**Term Offered:** Spring, Summer, Fall**FINA 4990 Independent Study: Readings And Research In Finance**

[1-3 credit hours]

An independent, professor supervised, course dealing with an in depth investigation of a financial area not covered adequately in another listed course.

Prerequisites: (FINA 3480 with a minimum grade of D- and FINA 4080 with a minimum grade of D- and FINA 4090 with a minimum grade of D-)**Term Offered:** Spring, Summer, Fall