New Course Proposal

1. Catalog Description

4400 FIN  Financial Analysis and Planning (3-0-3) F,S

Short Title:  FIN ANAL & PLAN

Course Description:  A seminar approach to studying the contemporary issues concerning analysis of firm performance and development of financial plans to support the firm’s strategic objectives.

Prerequisites: BUS 3710 with C or better, FIN 3720, FIN 3730, FIN 3770, and FIN 3780, or permission of the Associate Chair, School of Business.

2. Objectives of the course:

Upon successful completion of this course, students will:

1. Be able to identify significant exogenous factors that may impact on endogenous financial factors in the firm.
2. Be able to research each factor to understand exogenous manifestations and endogenous effects.
3. Understand application of a framework for qualitative and quantitative measurement of factor impact, weighing their importance and integrating factor impact effects into the financial analysis structure.
4. Be able to evaluate firm performance relative to the economic vitality of the market and to make estimates of projected firm performance.
5. Apply firm current and projected financial information to develop financial plans.

This course is structured as a writing-active course.

3. Outline of the Course:

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<tr>
<th>Week</th>
<th>Topic(s)</th>
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<tbody>
<tr>
<td>1</td>
<td>System Context of Financial Management</td>
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<td>2</td>
<td>Managing Operating Funds</td>
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<td>3</td>
<td>Assessing Business Performance – Financial Statement Analysis</td>
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<td>4</td>
<td>Assessing Business Performance – Analytical Extensions</td>
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<tr>
<td>5</td>
<td>Projection of Financial Requirements</td>
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<td>6</td>
<td>Dynamics and Growth of the Business System</td>
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<td>7</td>
<td>Cash Flow Estimation and Analysis</td>
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Student’s achievement of the course objectives will be measured by:

1. Team participation and performance in a semester-long financial management simulation.
2. Team completion of a non-financial and financial factors analysis of an assigned firm.
3. Team completion of an interim report of the financial plan for the assigned firm.
4. Team completion of the financial plan for the assigned firm.
5. Midterm examination.
6. Final examination.

4. Implementation:

a. Faculty members to whom course may be assigned:
   Waldo Born, Ph.D.
   Ing Yu Chiou, Ph.D.
   James Jordan-Wagner, Ph.D.
   Stephen Larson, Ph.D
   Richard Whitaker, Ph.D.

b. Additional costs:
   Financial Management Simulation documentation for each team. Cost is expected to be about $45 per semester per team.

c. Texts:

d. Term to be first offered:
   Spring 2003
5. **Rationale:**

Purpose and need: This course will be an elective in the finance major. Assessment of the professional concerns indicated that emphasis in the area of financial planning is needed to provide students with an integrated approach to analysis and planning. This course is designed to provide that integration. The subject matter of the course has been previously taught many times in FIN 4830, Current Issues in Finance. Enrollment in that course indicates that there is a demand for the course among finance students.

Justification for the Level of the Course and prerequisites: The course will be offered at the 4000 level to ensure that students take the course near the end of the undergraduate program. The prerequisites are the four courses that comprise the core of the finance major. Completion of these courses is needed to enable the student to develop the knowledge and skills needed for an integrated approach to financial analysis and planning.

Similarity to Existing Courses: This course is not similar to any other course in the University.

6. **Community College Transfer:**

A community college course will not be judged equivalent to this course.

7. **Date approved by the Discipline:** January 10, 2002

8. **Data approved by the School Curriculum Committee:** January 16, 2002.

9. **Date approved by the College Curriculum Committee:** January 25, 2002

10. **Data approved by CAA:** February 14, 2002