Course Description

Bridges financial management with corporate finance. Students apply financial data for use in decision making by applying financial theory to problems faced by commercial enterprises. Introduces students to basic financial theory, financial forecasting, time value of money techniques, and risk analysis. Other areas covered involve analyzing financial statements with ratios, valuing securities, capital budgeting, and calculating weighted average cost of capital.

Course Textbook


Course Learning Outcomes

Upon completion of this course, students should be able to:

1. Explain foundational finance theories.
2. Analyze a forecast using relevant data.
3. Apply time value of money techniques to various pricing (valuation) and budgeting problems.
4. Apply measures of risk in financial analysis.
5. Conduct preliminary financial statement and ratio analysis.
7. Perform a capital budgeting analysis.
8. Calculate weighted average cost of capital used in capital budgeting analysis.

Credits

Upon completion of this course, the students will earn three (3) hours of college credit.

Course Structure

1. Study Guide: Each unit contains a Study Guide that provides students with the learning outcomes, unit lesson, required reading assignments, and supplemental resources.
2. Learning Outcomes: Each unit contains Learning Outcomes that specify the measurable skills and knowledge students should gain upon completion of the unit.
3. Unit Lesson: Each unit contains a Unit Lesson, which discusses lesson material.
4. Reading Assignments: Each unit contains Reading Assignments from one or more chapters from the textbook.
5. Suggested Reading: Suggested Readings are listed in each unit’s study guide, except for Units V and VIII. Students are encouraged to read the resources listed if the opportunity arises, but they will not be tested on their knowledge of the Suggested Readings.
6. Learning Activities (Non-Graded): These non-graded Learning Activities are provided to aid students in their course of study.
7. Discussion Boards: Discussion Boards are part of all CSU term courses. More information and specifications can be found in the Student Resources link listed in the Course Menu bar.
8. Unit Assessments: This course contains three Unit Assessments, one to be completed at the end of Units I, III, and IV. Assessments are composed of written-response questions.
9. **Unit Assignments**: Students are required to submit for grading four Unit Assignments in Units II, V, VI, and VII. Specific information and instructions regarding these assignments are provided below. Grading rubrics are included with each assignment. Specific information about accessing these rubrics is provided below.

10. **Final Exam**: Students are to complete a Final Exam in Unit VIII. All Final Exams are proctored—see below for additional information. You are permitted four (4) hours to complete this exam in the presence of your approved proctor. This is an open-book exam. Only course textbooks and a calculator, if necessary, are allowed when taking proctored exams. The Final Exam is composed of multiple-choice and written-response questions.

11. **Ask the Professor**: This communication forum provides you with an opportunity to ask your professor general or course content related questions.

12. **Student Break Room**: This communication forum allows for casual conversation with your classmates.

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**CSU Online Library**

The CSU Online Library is available to support your courses and programs. The online library includes databases, journals, e-books, and research guides. These resources are always accessible and can be reached through the library webpage. To access the library, log into the myCSU Student Portal, and click on “CSU Online Library.” You can also access the CSU Online Library from the "My Library" button on the course menu for each course in Blackboard.

The CSU Online Library offers several reference services. E-mail (library@columbiasouthern.edu) and telephone (1.877.268.8046) assistance is available Monday – Thursday from 8 am to 5 pm and Friday from 8 am to 3 pm. The library’s chat reference service, *Ask a Librarian*, is available 24/7; look for the chat box on the online library page.

Librarians can help you develop your research plan or assist you in finding relevant, appropriate, and timely information. Reference requests can include customized keyword search strategies, links to articles, database help, and other services.

**LibGuides**

Click [here](#) for the LibGuide for this course.

Think of a LibGuide (a Library Guide) as a mini-website to help you with your assignments. It has relevant information such as databases, ebooks, and websites specific to your courses. If you have any questions, please reach out to your friendly library staff.

**Unit Assignments**

**Unit II Assignment**

Use the provided Excel template to submit your responses to each of the study problems from the textbook below:

- 3-13, p. 72. Review of financial statements
- 3-15, p. 73. Analyzing the cash flow statement
- 4-25, p. 116. Calculating financial ratios

Each question has a corresponding worksheet (look for the tab along the bottom of the workbook). The cells can be adjusted, added, or removed as necessary.

Click [here](#) for the Excel assignment template.

Information about accessing the Grading Rubric for this assignment is provided below.

**Unit V Assignment**

To complete the assignment, click [here](#) to download the worksheet, and type your answers in the fields provided. Save the document using your last name and student ID. Once complete, upload your assignment to Blackboard for grading.

Information about accessing the Grading Rubric for this assignment is provided below.
Unit VI Assignment

To complete the unit assignment, click here to download the worksheet, and type your answers in the fields provided. Save the document using your last name and student ID. Once complete, upload your assignment to Blackboard for grading.

Information about accessing the Grading Rubric for this assignment is provided below.

Unit VII Assignment

To complete the unit assignment, click here to download the worksheet, and type your answers in the fields provided. Save the document using your last name and student ID. Once complete, upload your assignment to Blackboard for grading.

Information about accessing the Grading Rubric for this assignment is provided below.

APA Guidelines

The application of the APA writing style shall be practical, functional, and appropriate to each academic level, with the primary purpose being the documentation (citation) of sources. CSU requires that students use APA style for certain papers and projects. Students should always carefully read and follow assignment directions and review the associated grading rubric when available. Students can find CSU’s Citation Guide by clicking here. This document includes examples and sample papers and provides information on how to contact the CSU Success Center.

Grading Rubrics

This course utilizes analytic grading rubrics as tools for your professor in assigning grades for all learning activities. Each rubric serves as a guide that communicates the expectations of the learning activity and describes the criteria for each level of achievement. In addition, a rubric is a reference tool that lists evaluation criteria and can help you organize your efforts to meet the requirements of that learning activity. It is imperative for you to familiarize yourself with these rubrics because these are the primary tools your professor uses for assessing learning activities.

Rubric categories include: (1) Discussion Board, (2) Assessment (Written Response), and (3) Assignment. However, it is possible that not all of the listed rubric types will be used in a single course (e.g., some courses may not have Assessments).

The Discussion Board rubric can be found within Unit I’s Discussion Board submission instructions.

The Assessment (Written Response) rubric can be found embedded in a link within the directions for each Unit Assessment. However, these rubrics will only be used when written-response questions appear within the Assessment.

Each Assignment type (e.g., article critique, case study, research paper) will have its own rubric. The Assignment rubrics are built into Blackboard, allowing students to review them prior to beginning the Assignment and again once the Assignment has been scored. This rubric can be accessed via the Assignment link located within the unit where it is to be submitted. Students may also access the rubric through the course menu by selecting “Tools” and then “My Grades.”

Again, it is vitally important for you to become familiar with these rubrics because their application to your Discussion Boards, Assessments, and Assignments is the method by which your instructor assigns all grades.

Final Examination Guidelines

Final Exams are to be administered to students by an approved Proctor. CSU approves two flexible proctoring options: a standard Proctor, who is chosen by the student and approved by the university, or Remote Proctor Now (RP Now), an on-demand, third-party testing service that proctors examinations for a small fee.

Students choosing RP Now must have an operational webcam/video with audio, a high-speed Internet connection, and the appropriate system rights required to download and install software.
To review the complete Examination Proctor Policy, including a list of acceptable Proctors, Proctor responsibilities, Proctor approval procedures, and the Proctor Agreement Form, go to the myCSU Student Portal from the link below.

http://mycsu.columbiasouthern.edu

You are permitted four (4) hours to complete this exam in the presence of your approved Proctor. This is an open book exam. Only course textbooks, writing utensils, and a calculator, if necessary, are allowed when taking proctored exams. Other materials are not permitted unless specified in the examination instructions and only the sources identified in the instructions may be used as source material.

**Communication Forums**

These are non-graded discussion forums that allow you to communicate with your professor and other students. Participation in these discussion forums is encouraged, but not required. You can access these forums with the buttons in the Course Menu. Instructions for subscribing/unsubscribing to these forums are provided below.

[Click here for instructions on how to subscribe/unsubscribe and post to the Communication Forums.](#)

**Ask the Professor**

This communication forum provides you with an opportunity to ask your professor general or course content questions. Questions may focus on Blackboard locations of online course components, textbook or course content elaboration, additional guidance on assessment requirements, or general advice from other students.

Questions that are specific in nature, such as inquiries regarding assessment/assignment grades or personal accommodation requests, are NOT to be posted on this forum. If you have questions, comments, or concerns of a non-public nature, please feel free to email your professor. Responses to your post will be addressed or emailed by the professor within 48 hours.

Before posting, please ensure that you have read all relevant course documentation, including the syllabus, assessment/assignment instructions, faculty feedback, and other important information.

**Student Break Room**

This communication forum allows for casual conversation with your classmates. Communication on this forum should always maintain a standard of appropriateness and respect for your fellow classmates. This forum should NOT be used to share assessment answers.

**Grading**

- Discussion Boards (8 @ 2%) = 16%
- Assessments (3 @ 10%) = 30%
- Assignments (4 @ 10%) = 40%
- Final Exam = 14%
- **Total** = 100%

**Course Schedule/Checklist (PLEASE PRINT)**

The following pages contain a printable Course Schedule to assist you through this course. By following this schedule, you will be assured that you will complete the course within the time allotted.
By following this schedule, you will be assured that you will complete the course within the time allotted. Please keep this schedule for reference as you progress through your course.

### Unit I: Foundational Financial Theory

<table>
<thead>
<tr>
<th>Review:</th>
<th>Unit Study Guide</th>
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| Read: | Chapter 1: Getting Started – Principles of Finance  
Chapter 2: Firms and the Financial Market  
**Suggested Reading:** See Study Guide |
| Discuss: | Discussion Board Response: Submit your response to the Discussion Board question by Saturday, 11:59 p.m. (Central Time)  
**Discussion Board Comment:** Comment on another student’s Discussion Board response by Tuesday, 11:59 p.m. (Central Time) |
| Submit: | **Assessment** by Tuesday, 11:59 p.m. (Central Time) |
| Notes/Goals: | |

### Unit II: Financial Forecasting

<table>
<thead>
<tr>
<th>Review:</th>
<th>Unit Study Guide</th>
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| Read: | Chapter 3: Understanding Financial Statements, Taxes, and Cash Flows, pp. 38-70  
Chapter 4: Financial Analysis – Sizing Up Firm Performance, pp. 76-111  
**Suggested Reading:** See Study Guide |
| Discuss: | Discussion Board Response: Submit your response to the Discussion Board question by Saturday, 11:59 p.m. (Central Time)  
**Discussion Board Comment:** Comment on another student’s Discussion Board response by Tuesday, 11:59 p.m. (Central Time) |
| Submit: | Assignment by Tuesday, 11:59 p.m. (Central Time)  
**Proctor Approval Form** |
<p>| Notes/Goals: | |</p>
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<tr>
<th>Unit III</th>
<th>Time Value of Money</th>
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| **Review:** | - Unit Study Guide  
- **Learning Activities (Non-Graded):** See Study Guide |
| **Read:** | - Chapter 5: The Value of Money – The Basics, pp. 126-150  
- Chapter 6: The Time Value of Money – Annuities and Other Topics, pp. 156-179  
- **Suggested Reading:** See Study Guide |
| **Discuss:** | - **Discussion Board Response:** Submit your response to the Discussion Board question by Saturday, 11:59 p.m. (Central Time)  
- **Discussion Board Comment:** Comment on another student’s Discussion Board response by Tuesday, 11:59 p.m. (Central Time) |
| **Submit:** | - **Assessment** by Tuesday, 11:59 p.m. (Central Time) |

**Notes/Goals:**

<table>
<thead>
<tr>
<th>Unit IV</th>
<th>Applying Risk Measures</th>
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| **Review:** | - Unit Study Guide  
- **Learning Activities (Non-Graded):** See Study Guide |
| **Read:** | - Chapter 7: An Introduction to Risk and Return – History of Financial Market Returns, pp. 190-219  
- Chapter 8: Risk and Return – Capital Market Theory, pp. 220-251  
- **Suggested Reading:** See Study Guide |
| **Discuss:** | - **Discussion Board Response:** Submit your response to the Discussion Board question by Saturday, 11:59 p.m. (Central Time)  
- **Discussion Board Comment:** Comment on another student’s Discussion Board response by Tuesday, 11:59 p.m. (Central Time) |
| **Submit:** | - **Assessment** by Tuesday, 11:59 p.m. (Central Time) |

**Notes/Goals:**

<table>
<thead>
<tr>
<th>Unit V</th>
<th>Financial Analysis</th>
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<tbody>
<tr>
<td><strong>Review:</strong></td>
<td>- Unit Study Guide</td>
</tr>
<tr>
<td><strong>Read:</strong></td>
<td>- Chapter 4: Financial Analysis – Sizing Up Firm Performance, pp. 76-111</td>
</tr>
</tbody>
</table>
| **Discuss:** | - **Discussion Board Response:** Submit your response to the Discussion Board question by Saturday, 11:59 p.m. (Central Time)  
- **Discussion Board Comment:** Comment on another student’s Discussion Board response by Tuesday, 11:59 p.m. (Central Time) |
| **Submit:** | - **Assignment** by Tuesday, 11:59 p.m. (Central Time) |

**Notes/Goals:**
### Unit VI: Stock and Bond Evaluation

**Review:**
- Unit Study Guide
- **Learning Activities (Non-Graded):** See Study Guide

**Read:**
- Chapter 9: Debt Valuation and Interest Rates, pp.252-291
- Chapter 10: Stock Valuation, pp. 298-323

**Discuss:**
- **Discussion Board Response:** Submit your response to the Discussion Board question by Saturday, 11:59 p.m. (Central Time)
- **Discussion Board Comment:** Comment on another student’s Discussion Board response by Tuesday, 11:59 p.m. (Central Time)

**Submit:**
- Assignment by Tuesday, 11:59 p.m. (Central Time)

### Unit VII: Capital Budgeting

**Review:**
- Unit Study Guide
- **Learning Activities (Non-Graded):** See Study Guide

**Read:**
- Chapter 11: Investment Decision Criteria, pp. 328-361

**Discuss:**
- **Discussion Board Response:** Submit your response to the Discussion Board question by Saturday, 11:59 p.m. (Central Time)
- **Discussion Board Comment:** Comment on another student’s Discussion Board response by Tuesday, 11:59 p.m. (Central Time)

**Submit:**
- Assignment by Tuesday, 11:59 p.m. (Central Time)
- **Request to take Final Exam**

### Unit VIII: Cost of Capital

**Review:**
- Unit Study Guide
- **Learning Activities (Non-Graded):** See Study Guide

**Read:**
- Chapter 14: The Cost of Capital, pp. 444-473
- Chapter 15: Capital Structure Policy, pp. 480-511

**Discuss:**
- **Discussion Board Response:** Submit your response to the Discussion Board question by Saturday, 11:59 p.m. (Central Time)
- **Discussion Board Comment:** Comment on another student’s Discussion Board response by Tuesday, 11:59 p.m. (Central Time)

**Submit:**
- Final Exam by Tuesday, 11:59 p.m. (Central Time)