Syllabus for Financial Spreadsheet Modeling (FINC 3330) – Sec 1
Spring 2018

Class Time: Tuesday & Thursday in SHB 202 from 12:30 – 1:50

Professor: Dr. Mary Funck

Professor's Office: SHB 206 H

Office Hours: Monday from 1:00 – 3:00
Wednesday from 9:00 – 11:00
Tuesday & Thursday from 8:15 – 9:15 and 2:00 – 3:00
Other times by appointment

Office Phone: (936) 294 – 1277

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Course Description: This 3-credit course will provide extensions of the financial principals covered in FINC 3320 and will augment the knowledge and skills required for upper level finance courses. Topics include financial math, mastery of Excel skills, pivot tables, importing external data, security pricing and returns, portfolio management, advanced capital budgeting and cash flow estimation techniques, and financial statement and ratio analysis.

Course Objectives: The objective of this course is for students to (1) developed specific skills and competencies related to the field of finance; (2) learn to model financial techniques in Microsoft Excel ®; and (3) improve critical thinking and problem solving abilities.

Course Material: Students need access to Microsoft Excel.

Prerequisites: Students will have earned a passing grade in FINC 3320 and have obtained junior standing.

Grading: Your grade is awarded according to the standard 10-point scale. Your final grade is calculated with a weighted average, as specified below:

A	> = 90
B	>= 80 < 90
C	>= 70 < 80
D	>= 60 < 70
F	< 60

Activity	Distribution
Homework Assignments & In-class Activities	40%
Exam Average	60%

Assignments – Students will complete assignments in Excel and submit completed workbooks through Blackboard. There will be 8 – 14 homework assignments, with each assignment's value ranging from 15 – 30 points. In addition, paper-based or online assignments may also be given.

In-Class Activities – Class activity will be routinely utilized to review/reinforce class material. These activities will not be announced. Only those students in attendance at the class period a class activity is completed can earn points for these activities. Class activity points cannot be made up.

<u>Exams</u> - There will be three exams. All exams may incorporate both conceptual questions and Excel-based completion problems. Students are allowed to create a reference sheet for each exam (one side of an 8.5 x 11 sheet). Students are not allowed to use calculators during exams, but they may access the Excel help function.

There will be no makeup tests. There is no exception to this policy. However, I do reserve the right to offer an alternative test time to students who notify me of <u>valid conflicts</u> PRIOR to a scheduled test. Alternative test times must be scheduled and the makeup tests taken before exam grades are posted.

<u>Anticipated</u> exam coverage and <u>approximate</u> dates:

Exam 1: Thursday, February 22, covering an Introduction to Excel, foundational Excel skills, data appearance, charts, and functions

Exam 2: Tuesday, April 3, covering financial math (time value of money), controlling user entries/actions, incorporating external data and pivot tables, and integrating Excel with other Office applications.

Exam 3: Thursday, May 3, covering macros, Active X and form objects, and what-if analysis.

Policies:

Attendance – Attendance is necessary and expected. I take attendance at all class sessions. A student missing more than four class sessions will have their final course percentage dropped by two percentage points for each absence over the maximum of four. It is the responsibility of each student to sign the attendance sheet.

If you are having difficulty with class material, do not delay in seeking help. The pace of this course is very quick and the class material gets progressively more complex - it is much better to resolve problems quickly.

To maintain student privacy, I do not e-mail grades nor do I give our grades over the telephone.

Please silence your cell phone and store it when class is in session. Students are not allowed to use the calculator on your cell phone during an exam. Should you use your cell phone during an exam, you will be required to submit your exam immediately and you will lose 10 points from your exam score. Should you not submit immediately, you will receive a zero.

RELIGIOUS HOLY DAYS: A student whose absence is excused for the observance of a religious holy day may not be penalized for that absence and shall be allowed to take an examination or complete an assignment from which the student is excused within a reasonable time after the absence. A student desiring to absent himself/herself from a scheduled class in order to observe a religious holy day(s) shall present to each instructor no later than the 15th calendar day after the first day of the semester, a written statement concerning the religious holy day(s). Students who are absent from class for observance of a religious holyday will be allowed to take an examination or complete an assignment scheduled for that day within one (1) week of returning to class.

DISABLED STUDENTS POLICY: It is the policy of Sam Houston State University that individuals otherwise qualified shall not be excluded, solely by reason of their disability, from

participation in any academic program of the university. Further, they shall not be denied the benefits of these programs nor shall they be subjected to discrimination. Students with disabilities that might affect their academic performance should register with the Office of Services for Students with Disabilities located in the Lee Drain Annex (telephone 936-294-3512, TDD 936-294-3786, and e-mail disability@shsu.edu). They should then arrange with their individual instructors so that appropriate strategies can be considered and helpful procedures can be developed to ensure that participation and achievement opportunities are not impaired.

ACADEMIC HONESTY: Students are expected to maintain honesty and integrity in the academic experiences both in and out of the classroom. Any student found guilty of dishonesty in any phase of academic work will be subject to disciplinary action. Having another student sign the attendance sheet in your absence is considered academic dishonesty for both the absent student and the student forging the signature.

VISITORS IN THE CLASSROOM: Only registered students may attend class. Exceptions can be made on a case-by-case basis by the professor. In all cases, visitors must not present a disruption to the class by their attendance. Students wishing to audit a class must apply to do so through the Registrar's Office.

STUDENT SYLLABUS GUIDELINES: You may find online a more detailed description of these policies at: http://www.shsu.edu/syllabus/

I reserve the right to alter the class format or schedule as circumstances dictate. Changes to the syllabus will be announced in class. Students not attending class are responsible for obtaining this information.

Financial Modeling in Excel (FINC 3330) Spring 2018

Section 1: 12:30 - 1:50 SHB202

Office: SHB 206H; Phone: (936) 294-1277

Dr. Mary Funck

email: mcf012@shsu.edu

	Tuesday	Thursday	
January		Introduction (Syllabus, Course Calendar, Why study Excel, certification exams) Lecture: Start Excel Fundamentals　　18	
	Lecture: Finish Excel Fundamentals Lecture: Start Data Appearance　　23	Lecture: Data Appearance　　25	
January / February	Lecture: Finish Data Appearance Lecture: Start Charts　　30	Lecture: Charts　　1	
February	Lecture: Finish Charts Lecture: Start Functions　　6	Lecture: Functions　　8	
	Lecture: Functions　　13	AEF - online activity　　15	AEF
	Lecture: Finish Functions Review for Exam 1　　20	Exam 1　　22	
February / March	Lecture: Start TVM　　27	Lecture: TVM　　1	
March	Lecture: Finish TVM Lecture: Start Data Control　　6	Lecture: Data Control　　8	SWF
	Spring Break!!　　13	Spring Break!!　　15	
	Lecture: Finish Data Control Lecture: Start External Data　　20	Lecture: External Data　　22	
	Lecture: Finish External Data Lecture: Integrating Excel Data　　27	Lecture: Review for Exam 2　　29	
April	Exam 2　　3	Lecture: Start Macros　　5	Q Drop
	Lecture: Macros　　10	Lecture: Finish Macros Lecture: Start Objects　　12	
	Lecture: Objects　　17	Lecture: Finish Objects Lecture: Start What-if Analysis　　19	
	Lecture: What-if Analysis　　24	Lecture: What-if Analysis　　26	
May	Lecture: Finish What-if Analsys Review for Exam 3　　1	Exam 3　　3	
May Final Exam Week	Applications & Activities　　8	10	

Thursday, February 1, 12th class day, is the last day to drop without a "Q" and receive 100% refund. Report attendance.

Friday, April 6 is the last day to drop with a "Q"

Grades are Due Monday May 14 by noon

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Instructor: Dr. Mary C. Funck
Syllabus Agreement

By signing this page, I agree that I have been provided with the syllabus for FINC 3330 for the spring term of 2018, and fully understand the grading policies, point system, and rules set out therein and agree to abide by them.

_____
Name (printed)

_____
Signature

_____
Date