

**Syllabus FIN 303 - Financial Modeling with Excel
Fall Semester, 2015**

(Everything on this syllabus is subject to change at my discretion.)

Instructor: Dr. Binay K. Adhikari
Class Meeting Times: *Section A* (CRN: 63290): Wednesday and Friday 8:30 AM - 9:50 AM in FSB 1013.
Section B (CRN: 63291): WF 10:00 AM - 11:20 AM in FSB 1013; *Section E* (CRN: 68725): WF 11:30 AM - 12:50 PM in FSB 2037
Student Hours: Wednesday and Friday 2.15 pm to 4.00 pm. Individual assistance is always available by appointment. I look forward to seeing you during student hours.
Office: FSB 3126
Office Phone: (513) 529 4109
Email: adhikabk@miamioh.edu

Objectives: The FIN 303 course provides a hands-on experience in using Excel to manipulate data for financial applications. The overall objective is to enhance critical thinking by developing Excel spreadsheet skills with emphasis on a variety of practical topics in financial analysis, especially personal finance, corporate finance and investments.

Prerequisites: ACC 221 and CSA 148. FIN 301 is a co-requisite.

Lectures: This class is about learning by doing. For the most part, I will be demonstrating how to implement some financial concepts in Excel, and you will be trying to replicate those on your computers. I will occasionally give you a quick overview of the topics we are about to work through. However, you are expected to obtain or have obtained most of the basic concepts from your prerequisite and co-requisite classes. Please attend every class. Notify me by email (preferably in advance) if you have to miss a class for any reason.

Course material: I will distribute the materials you need in this class. You must have access to Microsoft Excel 2013[®]. There is no required textbook, but you are free to consult any reference book you like. One good option is Walkenbach's *Excel 2013 Bible*, which can be accessed online via the library website.

Exams and Grading: Exams will almost entirely consist of working with Excel, and will be based on discussions during lectures. The final exam will be comprehensive. Following is the breakdown of grades:

1. <i>Smartphone free</i> ¹ attendance and participation	5%
2. Exam 1	25%*
3. Exam 2	25%*
4. Exam 3	25%*
5. Final Exam (Comprehensive)	45%

* For calculating the final grades, I will only consider two exams (out of three) of your personal best performance. This does not apply to the final exam, which is mandatory.

Grades will be assigned as follows: A+: 100%; A: 95% through 99.99%; A-: 90% through 94.99%; B+: 87% through 89.99%; B: 83% through 86.99%; B-: 80% through 82.99%; C+: 77% through 79.99%; C: 73% through 76.99%; C-: 70% through 72.99%; D+: 67% through 69.99%; D: 63% through 66.99%; D-: 60% through 62.99%; F: below 59.99%.

¹ "Dear Students, I know when you're texting in class. Seriously, no one just looks down at their crotch and smiles every five minutes." – Anonymous

I will consider requests for makeup exams only in the events of illness, death in the family and other traumatic circumstances. If possible, contact me in advance by email. If not, let me know within a week of missing the exam. I will need proper documentation.

Tentative Class Schedule⁺:

Excel Basic Operations, Statistics		8/26/2015
Excel Basic Operations, Statistics		8/28/2015
User Defined Functions		9/02/2015
Time Value of Money (TVM)		9/04/2015
TVM – Amortization, Bonds		9/09/2015
Cash Budgeting/Review	<i>[Last day to drop the class without a grade]</i>	9/11/2015
Exam 1		9/16/2015
Home Refinancing		9/18/2015
Retirement Saving		9/23/2015
Stock Valuation Models		9/25/2015
Look up functions etc.		9/30/2015
Consolidating		10/02/2015
Data Table/Review		10/07/2015
Midterm break/No Class		10/09/2015
Exam 2		10/14/2015
FMA Meetings/No Class		10/16/2015
Capital Budgeting		10/21/2015
Obtaining Financial Data from EDGAR	<i>[10/26 is the last day to drop with a 'W']</i>	10/23/2015
Working with Real World Data		10/28/2015
Working with Real World Data		10/30/2015
Solver Applications		11/04/2015
Exam 3		11/06/2015
Portfolio Management		11/11/2015
Portfolio Management		11/13/2015
Value-at-Risk (VaR)		11/18/2015
Pivot Table		11/20/2015
Thanksgiving break/No Class		11/25/2015
Thanksgiving break/No Class		11/27/2015
Miscellaneous Topics		12/02/2015
Review for Final	<i>[Last day of class]</i>	12/04/2015
Final Exams		
Section A: Wednesday, Dec 9 (8:00 am to 10: am); Section B: Friday, Dec 11 (10:15 am - 12:15 pm)		
Section E: Wednesday, Dec 9 (10:15 am - 12:15 pm)		

⁺ This only provides an expected timeline and may change at my discretion. Topics may be removed and additional topics may be inserted, as time permits. Each topic does not necessarily carry equal weight in lectures or exams.

Accommodations: The Americans with Disabilities Act (ADA) is a federal anti-discrimination statute that provides comprehensive civil rights for persons with disabilities. If you are a student with a disability and feel that you may need a reasonable accommodation to fulfill the essential functions of the course that are listed in this syllabus, students with physical and/or psychiatric disabilities are encouraged to contact the Office of Disability Resources at 513-529-1541 (V/TTY), and students with AD(H)D and/or specific learning disabilities may contact the Rinella Learning Center at 513-529-8741. I will make reasonable accommodations for persons with disabilities. Guidelines for who is eligible for services and accommodations can be found at <http://www.units.muohio.edu/oeco/odr/>

Academic integrity: Academic Integrity is at the heart of the mission and values of Miami University and is an expectation of all students. Maintaining academic integrity is a reflection of your character and a means to ensuring that you are achieving the outcomes of this course and that your grades accurately reflect your learning and understanding of the course material. You must be aware of the University's policy on academic integrity, which is found in Chapter 5 of The Student Handbook. Also be familiar with the information that Miami University provides on academic integrity at <http://www.miami.miamioh.edu/integrity/>. I will rigorously enforce academic Miami's academic integrity policies.

Learn, enjoy and be happy. All the best!

