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**FINA 4920 33-075**  
**FALL 2009**  
**MARY ELIZABETH THOMPSON**

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**Fall 2009:**

Terry College of Business  
University of Georgia  
Lecture: T/Th 11:00 a.m. – 12:15 p.m. Caldwell Hall Room 305

**Instructor:** Mary Elizabeth Thompson

**Contact Information:**

My Office: Brooks G13

My E-mail: FINA4920fall2009@gmail.com

My Office Telephone: 706-542-7470

My Office Hours: exact day/time TBD; by appointment

Course Web Site: We will use eLearning commons: elc.uga.edu

**Additional contact info:** For e-mails regarding queries on course material or requests for meetings please use my gmail e-mail address. However, you should make a habit of checking eLearning regularly as I will use the announcement facility there to send general instructions and comments to the class.

**Course description:** Applying computers to business applications especially using Excel in finance-related work. The objective of the course is to help students learn how to use spreadsheets (Microsoft Excel) to solve a variety of corporate finance and investment problems. The course is real-world oriented and is expected to be useful training for a variety of jobs in banking and finance.

**Prerequisites:**

- I. FINA 3000
- II. One of the following:
  - a. MSIT 3000
  - b. STAT 3000

**Course objectives:**

The main objective of the course is to learn how to use Excel to solve a variety of problems in finance. The course is very 'hands-on' and is expected to help you develop skills that are useful in a variety of jobs in finance, accounting, insurance, real estate and management. The goal is for finance majors to apply the concepts of investments, small business finance, and corporate finance into an Excel framework. The student will also be able to write documents describing results created in Excel.

**Course outline:**

Topics to be covered include:  
Excel fundamentals  
Formulas  
Charts and graphs  
Time value of money

Stock pricing  
Capital budgeting  
Bond pricing  
Logical functions  
Regression analysis  
Portfolios  
PivotTables  
Options  
Random numbers

**Honor code:** All academic work must meet the standards contained in "A Culture of Honesty." All students are responsible to inform themselves about those standards before performing any academic work. As a UGA student, you have agreed to abide by the University's academic honesty policy and the student honor code. All academic work must meet the standards described in "A Culture of Honesty", found at [www.uga.edu/honesty](http://www.uga.edu/honesty), which includes the following statement:

*The University of Georgia seeks to promote and ensure academic honesty and personal integrity among students and other members of the University community. A policy on academic honesty (and procedural guidelines for adjudication of alleged violations of academic honesty) has been developed to serve these goals. Academic honesty means performing all academic work without plagiarizing, cheating, lying, tampering, stealing, receiving assistance from any other person or using any source of information that is not common knowledge (unless that assistance or use is authorized by the person responsible for supervising that academic work or fairly attributed to the source of assistance or information).*

Lack of knowledge of the academic honesty policy is not a reasonable explanation for a violation. Questions related to course assignments and the academic honesty policy should be directed to the instructor. Any violation will be reported to the Office of Academic Affairs.

**Academic accommodations:** If you would like to request academic accommodations due to a disability please contact The Disability Resource Center, 114 Clark Howell Hall, 706-542-8719 voice, 706-542-7719 fax, or 706-542-8778. If you have a letter from Disability Services indicating you have a documented disability that requires academic accommodations, please present the letter to me in person as early as possible so we can discuss the accommodations you might need for class. **If we do not meet in person to go over the "blue" form the week prior to an exam, you will not be assigned any accommodation for the exam.**

**Changes to the syllabus:** The course syllabus is a general plan for the course; deviations announced to the class by the instructor may be necessary.

**Required course material:**

Required: *Principles of Finance with Excel*, by Simon Benninga (ISBN: 0-19-530150-1), Oxford University Press, 2006.

Optional:

Excel 2007 Bible, by John Walkenbach, ISBN: 0470044039

Excel VBA Programming For Dummies, by John Walkenbach, ISBN: 0470044012

The main purpose of my required book recommendation for this class is to provide guidance for you when you work on topics outside of regular class time. I will not strictly follow or work from the book during class. Surf amazon.com or half.com for cheaper, second-hand versions of the book.

**Assignments:** Various assignments will be given during the course of the semester. Please pay careful attention in class and check in on ELC (eLearning commons) regularly to ensure that you are always aware of upcoming assignments and their requirements. There will be at least one short presentation (maybe group, maybe individual) on a finance-related topic of your choice, along with numerous interesting projects throughout the course, including a long-term investment trading game.

**Attendance Policy:** The official attendance policy of the university states: "Students are expected to attend classes regularly." Come to class. You are all adults, and you know you need to come to class. I do not keep track of attendance regularly during the semester, but I will take attendance randomly as I see fit, because frequent absences will hurt your chances of good scores on tests and the exam. Furthermore, 10% of your final grade will be based on attendance/compliance (as outlined below) and frequent absences from class may hurt your score in this component. You are responsible for the material we cover in class, along with all changes that are made in course content during class. It has been proven time and time again that students who attend their classes and participate perform far better than those who don't. Come prepared. If you have to arrive late, need to leave class early or have step out for a moment, please feel free to do so as long as you don't disturb the whole class. This class should be informative and instructive, and you will gain many skills that you can directly apply to your post-collegiate careers, so students generally enjoy this class. I not only expect you to put sufficient effort into your assignments, but I also expect you to generate and engage in discussion during class lectures, as doing so will greatly benefit your fellow students and increase your enjoyment of this class.

**Grade Determination:** Final grade assignments will depend upon your overall performance and will be determined as objectively as possible based on the following weights:

Midterms: 15% per midterm (2 midterms total)

Final Project/Exam 30%

Assignments 30%

Participation/Attendance 10%

Your final grade will be determined solely on your scores in the above components. Letter grades will be assigned according to the following percentages:

90.0% - 100% A

80.0% - 89.9% B

70.0% - 79.9% C

60.0% - 69.9% D

0.0% - 59.9% F

I weight the *amount of points* you earn on each graded activity by the weights listed above over the course of the semester. However, I reserve the right to change the letter grade cutoffs provided above if I see fit. Plus/minus characterizations will not be determined until the final grades are determined, after the final exam/project has been graded. Therefore, questions about your plus/minus score are irrelevant until then. Furthermore, plus/minus characterizations are very much up to my discretion to assign as I see fit.

**General policies regarding grades:** It is crucial to maintain a fair and level playing field. The following policies are designed and strictly enforced in order to insure that no one student has or gets an advantage over the other students. All assignment scores count in the percentages stated. No grades are dropped, unless I alter this policy and make that clear to you as a class.

- I. There are no make-ups, ever.
- II. If you miss a midterm due to a serious illness you must have written documentation from a physician. Since there are no make-ups, additional weight will be put on the final assignment.
- III. Medical conditions without written documentation are irrelevant. No consideration will be given to a student who claims any illness without written documentation.
- IV. If you miss a midterm or cannot turn in an assignment for a University of Georgia sanctioned varsity athletic event for which I had prior knowledge additional weight will be put on the final assignment.
- V. If you have a sudden death in the family that may prevent you from attending a midterm or turning in an assignment, you must provide documentation, and I will re-weight your final assignment.
- VI. If you start a midterm and have a sudden illness or emergency you will not be allowed to complete the remainder of the midterm at a later date. Whatever score you get on the incomplete exam counts toward your final grade. Your final exam will not be re-weighted should you be unable to complete a midterm.
- VII. Facts such as your scholarship status, timeline for graduating, participation in athletics, or any other particular facts of your life you think are important and bear special consideration with respect to grades are irrelevant. Your grade will be determined solely by your performance on the assignments. No special considerations with respect to grades are ever provided to any student ever.