



# PROGRAM PLANNING GUIDE

ID: 

Name: \_\_\_\_\_



## Bachelor of Management as a Second Degree

### Finance



Finance is the study of financial decision making in investment, portfolio management and corporate finance as well as managing risk, financial innovations in a dynamic business environment. As a student in finance, you'll study areas such as corporate and personal finance, investments, global finance, financial technology (fintech), financial institutions and markets, and derivatives. You will develop your skills using excel, statistical, trading and portfolio management software and draw from fields such as economics, accounting and social responsibility as you prepare for career opportunities.

#### What determines my program requirements?

Please refer to the Academic Calendar ([www.ulethbridge.ca/ross/academic-calendar](http://www.ulethbridge.ca/ross/academic-calendar)) for complete program information.

**Calendar Year:** 2024/2025 - Your calendar year is set to the academic year you are admitted (or readmitted) and you should follow the requirements for that year for the duration of your program.

**Faculty/School:** Dhillon School of Business ([www.ulethbridge.ca/dhillon](http://www.ulethbridge.ca/dhillon)) - An internationally accredited AACSB business school

**Program(s):** Bachelor of Management

**Major(s):** Finance

**Minor:** A defined set of courses, designed to provide depth in a particular discipline, study in an interdisciplinary area, or focus on a theme-related topic. To learn more about optional minors see [www.ulethbridge.ca/ross/minors](http://www.ulethbridge.ca/ross/minors).

#### Am I admissible to this program?

**Admission:** [www.ulethbridge.ca/ross/admissions/undergrad](http://www.ulethbridge.ca/ross/admissions/undergrad)

**Transfer:** [www.ulethbridge.ca/ross/transfer-resources](http://www.ulethbridge.ca/ross/transfer-resources)

#### When/How do I apply to the University?

**Deadlines:** [www.ulethbridge.ca/ross/admissions/undergrad/deadlines](http://www.ulethbridge.ca/ross/admissions/undergrad/deadlines)

**Step-by-Step:** [www.ulethbridge.ca/ross/admissions/step-by-step](http://www.ulethbridge.ca/ross/admissions/step-by-step)

#### Where can I find information on courses?

**Course Catalogue:** [www.ulethbridge.ca/ross/courses](http://www.ulethbridge.ca/ross/courses)

**Registration Guide:** [www.ulethbridge.ca/ross/registration-guide](http://www.ulethbridge.ca/ross/registration-guide)

#### When can I register for classes?

**Register early!** (March for Summer and Fall; November for Winter)

**Registration Dates:** [www.ulethbridge.ca/ross/registration-dates](http://www.ulethbridge.ca/ross/registration-dates)

#### How can I enhance my program?

**Career Bridge:** [www.ulethbridge.ca/career-bridge](http://www.ulethbridge.ca/career-bridge)

**Honours Thesis:** [www.ulethbridge.ca/ross/undergraduate-thesis](http://www.ulethbridge.ca/ross/undergraduate-thesis)

**Student Professional Development:**

[www.ulethbridge.ca/dhillon/student-experience/student-professional-development](http://www.ulethbridge.ca/dhillon/student-experience/student-professional-development)

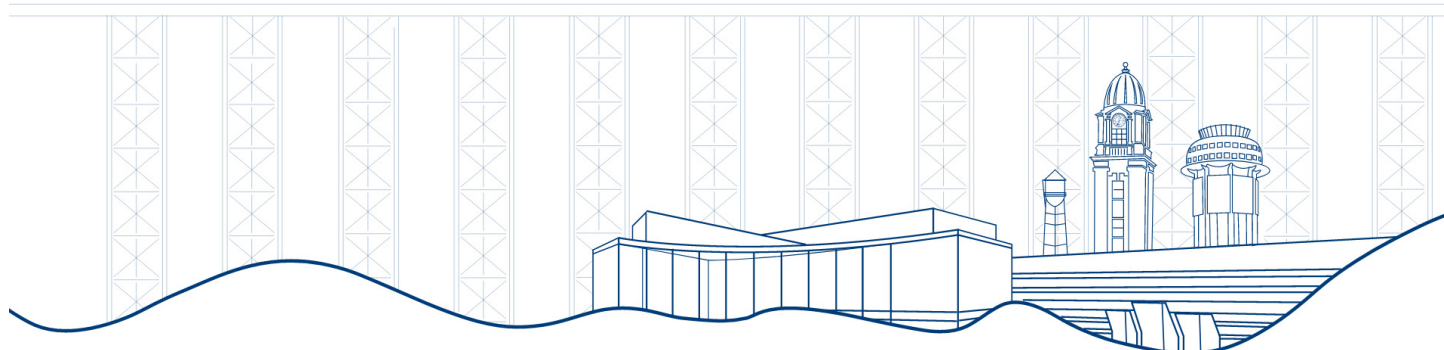
#### What supports are available to students?

**Student Services:** [www.ulethbridge.ca/campus-life/student-services](http://www.ulethbridge.ca/campus-life/student-services)

**Student Success Centre:** [www.ulethbridge.ca/student-success-centre](http://www.ulethbridge.ca/student-success-centre)

**Accessible Learning:** [www.ulethbridge.ca/ross/alc](http://www.ulethbridge.ca/ross/alc)

**Counselling Services:** [www.ulethbridge.ca/counselling](http://www.ulethbridge.ca/counselling)





## Required courses and notes

**Previous Degree:** \_\_\_\_\_

**Institution:** \_\_\_\_\_

**AGPA:** \_\_\_\_\_

**AWARDED:** \_\_\_\_\_

### General Requirements

Students must meet the academic standards, program requirements, and graduation requirements according to the regulations set by the Dhillon School of Business, and as outlined in the Calendar including, but not limited to:

\_\_\_\_\_ A minimum grade of 'C-' is required in all Dhillon School of Business courses (ACCT, AGEM, FINC, HRLR, IGBM, IMGT, MGT, and MKTG) and courses cross-listed with Dhillon School of Business courses; Economics 1010; Economics 1012; Statistics 1770; Writing 1000 or English 1900; and all courses in the major marked with an asterisk (\*) in order to meet degree requirements.

\_\_\_\_\_ Successful completion of 15-25 courses (45.0-75.0 credit hours) with a cumulative and graduation grade point average (GPA) of at least 2.00. To determine graduation grade point averages, see **Dhillon School of Business, Graduation** in the 2024/2025 University of Lethbridge Calendar, [www.ulethbridge.ca/ross/academic-calendar](http://www.ulethbridge.ca/ross/academic-calendar).

1. Second degree programs will be developed individually and will be a maximum of 25 courses in length.
2. Courses completed as part of a first degree may be used to waive course requirements in the B.Mgt. as a second degree. Such waivers will be decided at the time of admission by the Dhillon School of Business advising office. Course materials requested for further assessment must be submitted to the Dhillon School of Business advising office by the last day of the student's first term. Any request for reassessment of course waivers must also be made by the last day of the student's first term. Please refer to Academic Schedule to determine the last day of the term. Students who change to another major after admission will need to have their program reassessed and may be required to complete additional courses for the new major.

\_\_\_\_\_ All degree requirements must be completed within 10 years after acceptance into the Dhillon School of Business.

\_\_\_\_\_ Residence Requirement: Students must successfully complete at least 15 courses at the University of Lethbridge, including 10 Dhillon School of Business courses at the 3000/4000 level. In addition, Finance majors must complete all courses from the following list, and which are part of their major, at the U of L: Finance 3412, Finance 3441, Finance 3460, Finance 3480, Finance 4421, Finance 4430, Finance 4451.

### Core Requirements (15 Courses)

- \_\_\_\_\_ 1. Economics 1010 - Introduction to Microeconomics
- \_\_\_\_\_ 2. Economics 1012 - Introduction to Macroeconomics
- \_\_\_\_\_ 3. Statistics 1770 - Introduction to Probability and Statistics
- \_\_\_\_\_ 4. Marketing 2020 - Marketing
- \_\_\_\_\_ 5. Management 2070/Economics 2070 - Operations and Quantitative Management
- \_\_\_\_\_ 6. Accounting 2100 - Introductory Accounting
- \_\_\_\_\_ 7. Accounting 2400 - Management Accounting
- \_\_\_\_\_ 8. Management 3031 - Managing Responsibly in a Global Environment
- \_\_\_\_\_ 9. Finance 3040 - Finance
- \_\_\_\_\_ 10. Human Resources and Labour Relations 3050 - Human Resource Management
- \_\_\_\_\_ 11. International Management 3650 - Introduction to International Management
- \_\_\_\_\_ 12. Management 4090 - Management Policy and Strategy

- \_\_\_\_\_ 13. **One of:**
  - \_\_\_\_\_ Management 3062 - Information Systems and Data Analytics
  - \_\_\_\_\_ Accounting 3171 - Accounting Information Systems and Data Analytics
  - \_\_\_\_\_ Management 3622 - Visual Analytics

- \_\_\_\_\_ 14. **One of the following with Indigenous content:**
  - \_\_\_\_\_ Any course from the Indigenous Governance and Business Management (IGBM) subject codes list
  - \_\_\_\_\_ Any course from the Indigenous Studies (INDG) subject codes list
  - \_\_\_\_\_ Aboriginal Health 1000 - Introduction to Aboriginal Health
  - \_\_\_\_\_ Art History 3152 - Indigenous Art History (Series)
  - \_\_\_\_\_ Blackfoot 1000 - Introductory Spoken Blackfoot
  - \_\_\_\_\_ Blackfoot 2210 - Structure of the Blackfoot Language
  - \_\_\_\_\_ Cree 2210 - Structure of the Plains Cree Language
  - \_\_\_\_\_ Liberal Education 1850 - Conversational Indigenization: Reconciling Reconciliation
  - \_\_\_\_\_ Political Science 3215 - Indigenous Peoples and Local Government in Canada

- \_\_\_\_\_ 15. **One of:**
  - \_\_\_\_\_ Management 2081 - Professional Communications Skills
  - \_\_\_\_\_ Writing 1000 - Introduction to Academic Writing

### Major Requirements (10 Courses)

- \_\_\_\_\_ 16. Finance 3412 - Fundamentals of Investments
- \_\_\_\_\_ 17. Finance 3470 - Corporate Finance
- \_\_\_\_\_ 18. Finance 4430 - Financial Management
- \_\_\_\_\_ 19. Economics 3030 - Managerial Economics
- \_\_\_\_\_ 20. Mathematics 1510 - Calculus for Management and Social Sciences
- \_\_\_\_\_ 21. **One of:**
  - \_\_\_\_\_ Finance 4421 - Financial Institutions and Markets
  - \_\_\_\_\_ Finance 4451 - Derivative Securities Markets
- \_\_\_\_\_ 22.-24. **Three of:**
  - \_\_\_\_\_ Finance 3406 - Entrepreneurial Finance
  - \_\_\_\_\_ Finance 3441 - Financial Analysis
  - \_\_\_\_\_ Finance 3460 - Global Financial Management
  - \_\_\_\_\_ Finance 3475/Agricultural Enterprise Management 3475 - Agricultural Finance and Markets
  - \_\_\_\_\_ Finance 3480 - Personal Finance I
  - \_\_\_\_\_ Finance 3490 - FinTech
  - \_\_\_\_\_ Finance 3600 - Machine Learning in Business and Finance
  - \_\_\_\_\_ Finance 4421 - Financial Institutions and Markets
  - \_\_\_\_\_ Finance 4451 - Derivative Securities Markets
  - \_\_\_\_\_ Finance 4460 - Trading and Portfolio Management
  - \_\_\_\_\_ Finance 4470 and Finance 4471 - Student Managed Investment Fund
  - \_\_\_\_\_ <sup>1</sup> Finance 4480 - Personal Finance II
- \_\_\_\_\_ 25. **One of:**
  - \_\_\_\_\_ Economics 2900 - Economics and Business Statistics
  - \_\_\_\_\_ Statistics 2780 - Statistical Inference

### Notes

<sup>1</sup> Students should be aware that this course has prerequisites which may require taking courses extra to their program requirements.



## Recommended Course Sequence

Shown below is the recommended sequence of courses for your degree. Consult timetables for course offerings, prerequisites, and corequisites before registering each term as some courses may have limited offerings (ie. once a year, alternating years, or only offered in the Fall or Winter terms).

Consult with an Academic Advisor in your faculty if you wish to alter this sequence with regard to the specifically listed courses.

**Note that this sequence was prepared based on course scheduling at the time of publication and may change during your studies.**

### First Year (Term 1)

- Accounting 2100
- Economics 1010
- Mathematics 1510
- Statistics 1770
- One of: Management 2081 or Writing 1000

### First Year (Term 2)

- Accounting 2400
- Economics 1012
- Human Resources and Labour Relations 3050
- Marketing 2020
- One of: Economics 2900 or Statistics 2780

### Second Year (Term 1)

- Finance 3040
- Economics 3030
- Management 2070/Economics 2070
- Management 3031
- <sup>1</sup>Indigenous Content Requirement

### Second Year (Term 2)

- <sup>2</sup>Finance Elective
- <sup>2</sup>Finance Elective
- Finance 3412
- Finance 3470
- International Management 3650

### Third Year (Term 1)

- <sup>2</sup>Finance Elective
- Finance 4430
- One of: Finance 4421 or Finance 4451
- One of: Accounting 3171, Management 3062, or Management 3622
- Management 4090

1. Refer to the list of Indigenous Content courses in the preceding core requirements.
2. Refer to the 'Three of' list in the preceding major requirements.

## Final Program Check

Request a Final Program Check at [www.ulethbridge.ca/dhillon/final-program-check](http://www.ulethbridge.ca/dhillon/final-program-check) by December 1 (April completers) or by April 1 (June, August, & December completers) and after registering in your final term.

Program requirements with _____ (majors, minors, concentrations)	
<input type="checkbox"/> will be met upon successful completion of _____ currently enrolled courses	<input type="checkbox"/> have been met
U of L GPA: _____	Grad GPA: _____
Co-op: _____	Honours Thesis: _____
Advisor: _____	Date: _____