



PROGRAM PLANNING GUIDE

ID:

Name: _____



Management Certificate

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) 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) - An internationally accredited AACSB business school

Program(s): Management Certificate

Major(s): Finance

Please contact an Academic Advisor before applying to this program for information on course sequencing and possible waivers for equivalent courses already taken.

Am I admissible to this program?

Admission: www.ulethbridge.ca/ross/admissions/undergrad

Transfer: www.ulethbridge.ca/ross/transfer-resources

When/How do I apply to the University?

Deadlines: www.ulethbridge.ca/ross/admissions/undergrad/deadlines

Step-by-Step: www.ulethbridge.ca/ross/admissions/step-by-step

Where can I find information on courses?

Course Catalogue: www.ulethbridge.ca/ross/courses

Registration Guide: 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

How can I enhance my program?

Career Bridge: www.ulethbridge.ca/career-bridge

Honours Thesis: www.ulethbridge.ca/ross/undergraduate-thesis

Student Professional Development:

www.ulethbridge.ca/dhillon/student-experience/student-professional-development

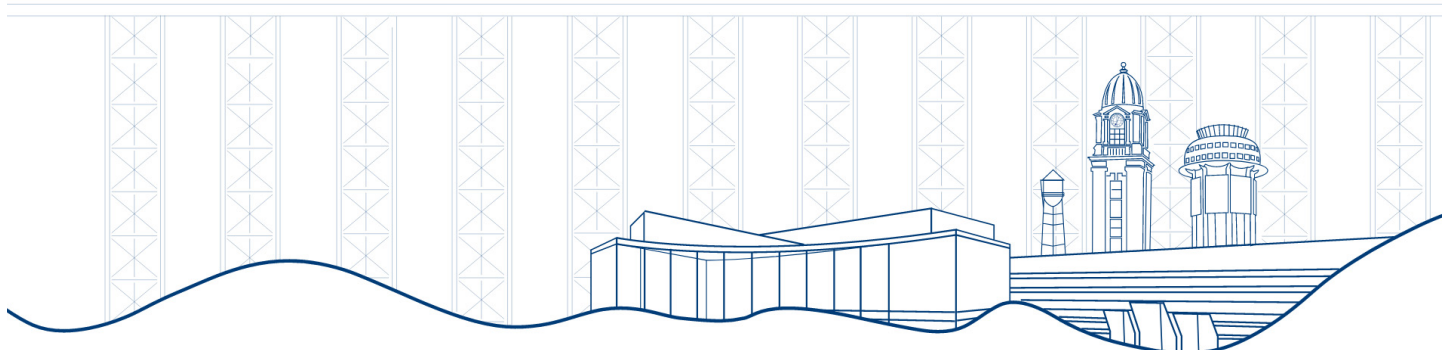
What supports are available to students?

Student Services: www.ulethbridge.ca/campus-life/student-services

Student Success Centre: www.ulethbridge.ca/student-success-centre

Accessible Learning: www.ulethbridge.ca/ross/alc

Counselling Services: www.ulethbridge.ca/counselling



Required courses and notes

Core Requirements (10 courses)

- _____ 1. Accounting 2100 - Introductory Accounting
- _____ 2. Accounting 2400 - Management Accounting
- _____ 3. Finance 3040 - Finance
- _____ 4. Finance 3412 - Fundamentals of Investments
- _____ 5. Finance 3470 - Corporate Finance
- _____ 6. Finance 4430 - Financial Management
- _____ 7. Economics 1010 - Introduction to Microeconomics
- _____ 8. Statistics 1770 - Introduction to Probability and Statistics
- _____ 9. **One of:**
 - _____ Economics 2900 - Economics and Business Statistics
 - _____ Statistics 2780 - Statistical Inference
- _____ 10. **One 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
 - _____ ¹ Finance 4480 - Personal Finance II

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

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 courses taken towards a Management Certificate.
- _____ Successful completion of at least 10 courses (30.0 credit hours) with cumulative and graduation grade point average (GPA) of at least 2.00.
- _____ Management Certificate programs are designed to be completed on a part-time studies basis, and many of the certificate courses have prerequisite, corequisite, and/or recommended background requirements that are above and beyond the 10 courses in the program. As a result, completion of this program will take more than one year of study. All certificate requirements must be completed within 5 years after acceptance into the Dhillon School of Business.
- _____ Residence Requirement: Students must complete at least 5 courses towards the Management Certificate at the University of Lethbridge. In addition, Finance majors must complete all courses from the following list, and which are part of their major, at the University of Lethbridge: Finance 3412, Finance 3441, Finance 3460, Finance 3480, Finance 4421, Finance 4430, Finance 4451.



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.

Term 1

Accounting 2100
Economics 1010
Statistics 1770

Term 2

Accounting 2400
¹Economics 1012
One of: Economics 2900 or Statistics 2780\

Term 3

Finance 3040

Term 4

Finance 3412
Finance 3470

Term 5

²Finance Elective
Finance 4430

- 1. This prerequisite is required above and beyond the 10 courses in the program.
- 2. Refer to the 'One of' list in the preceding core requirements.

Final Program Check

Request a Final Program Check at 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: _____	Advisor: _____ Date: _____