



PROGRAM PLANNING GUIDE

ID:

Name: _____



Post-Diploma Bachelor of Management

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): 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.

This Program Planning Guide (PPG) must be customized based on your diploma transcripts. A customized PPG will be sent to your U of L email account following your acceptance to this program.

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

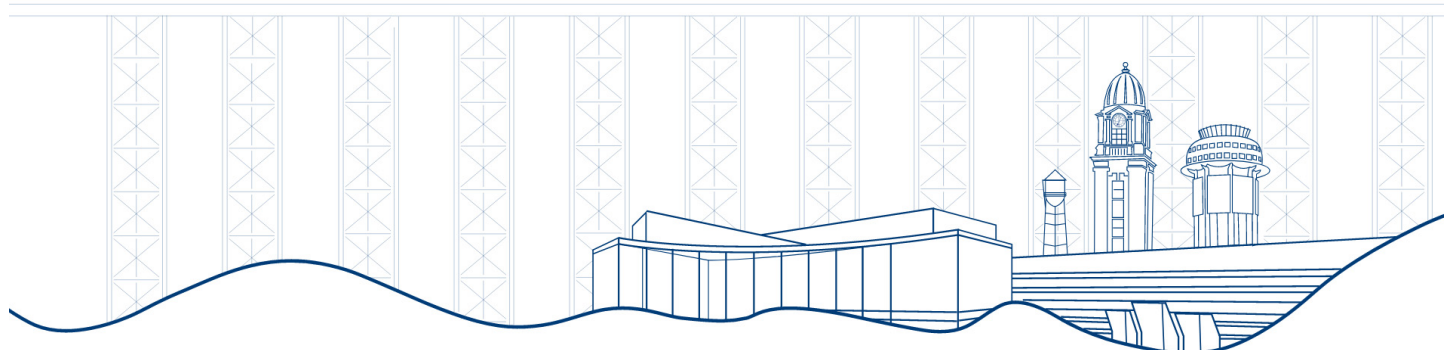
What supports are available to students?

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 (9 Courses)

- _____ 1. Statistics 1770 - Introduction to Probability and Statistics
- _____ 2. Management 2070/Economics 2070 - Operations and Quantitative Management
- _____ 3. Management 3031 - Managing Responsibly in a Global Environment
- _____ 4. Human Resources and Labour Relations 3050 - Human Resource Management
- _____ 5. International Management 3650 - Introduction to International Management
- _____ 6. Management 4090 - Management Policy and Strategy
- _____ 7. **One of:**
 - _____ Management 3062 - Information Systems and Data Analytics
 - _____ Accounting 3171 - Accounting Information Systems and Data Analytics
 - _____ Management 3622 - Visual Analytics

Indigenous Content Requirement:

If the course that is selected from the list below does not have a Fine Arts and Humanities designation, an additional Fine Arts and Humanities elective will be needed extra to degree in order to meet Liberal Education requirements.

- _____ 8. **One of:**
 - _____ 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
 - _____ ¹ Political Science 3215 - Indigenous Peoples and Local Government in Canada

Writing Requirement:

Students who have a final grade of 80% or higher in AB high school English Language Arts 30-1 (or equivalent 5-credit course); or who have successfully completed the writing challenge test (see www.ulethbridge.ca/dhillon/advising-faqs) may request to substitute a Fine Arts and Humanities Liberal Education List Requirement for Writing 1000 or English 1900. Contact your DSB Advisor.

- _____ 9. **One of:**
 - _____ Writing 1000 - Introduction to Academic Writing
 - _____ English 1900 - Introduction to Language and Literature

Major Requirements (9 Courses)

- _____ 10. Finance 3412 - Fundamentals of Investments
- _____ 11. Finance 3470 - Corporate Finance
- _____ 12. Finance 4430 - Financial Management
- _____ 13. Economics 3030 - Managerial Economics
- _____ 14. Mathematics 1510 - Calculus for Management and Social Sciences
- _____ 15. **One of:**
 - _____ Finance 4421 - Financial Institutions and Markets
 - _____ Finance 4451 - Derivative Securities Markets
- _____ 16.-17. **Two 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
- _____ 18. **One of:**
 - _____ Economics 2900 - Economics and Business Statistics
 - _____ Statistics 2780 - Statistical Inference

Electives (2 Courses)

Minor courses may fill electives where applicable.

- _____ 19.-20. Two Fine Arts and Humanities electives chosen to ensure completion of the Liberal Education List Requirement (see **School of Liberal Education** in the 2024/2025 University of Lethbridge Calendar, www.ulethbridge.ca/ross/academic-calendar)
- _____ 19. _____
- _____ 20. _____

Notes:

¹ 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.

Third Year (Term 1)

- Human Resources and Labour Relations 3050
- International Management 3650
- Mathematics 1510
- Statistics 1770
- ¹One of: Writing 1000 or English 1900

Third Year (Term 2)

- Economics 3030
- Management 3031
- Finance 3470
- One of: Economics 2900 or Statistics 2780
- Elective - Fine Arts & Humanities

Fourth Year (Term 1)

- ²Finance Elective
- Finance 3412
- Management 2070/Economics 2070
- One of: Accounting 3171, Management 3062, or Management 3622
- ³Indigenous Content Requirement

Fourth Year (Term 2)

- ²Finance Elective
- Management 4090
- Finance 4430
- One of: Finance 4421 or Finance 4451
- Elective - Fine Arts & Humanities

1. Students who have a final grade of 80% or higher in AB high school English Language Arts 30-1 (or equivalent 5-credit course); or who have successfully completed the writing challenge test (see www.ulethbridge.ca/dhillon/advising-faqs) may request to substitute a Fine Arts and Humanities Liberal Education List Requirement for Writing 1000 or English 1900. Contact your DSB Advisor.
2. Refer to the 'Two of' list in the preceding major requirements.
3. Refer to the list of Indigenous Content courses in the preceding core requirements. Students should take an Indigenous content course with a Fine Arts and Humanities designation otherwise they will have an extra course to complete program 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.

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|---|--|
| 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: _____ |