



# PROGRAM PLANNING GUIDE

ID: 

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



## Undergraduate Diploma

### 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):** Undergraduate Diploma

**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)

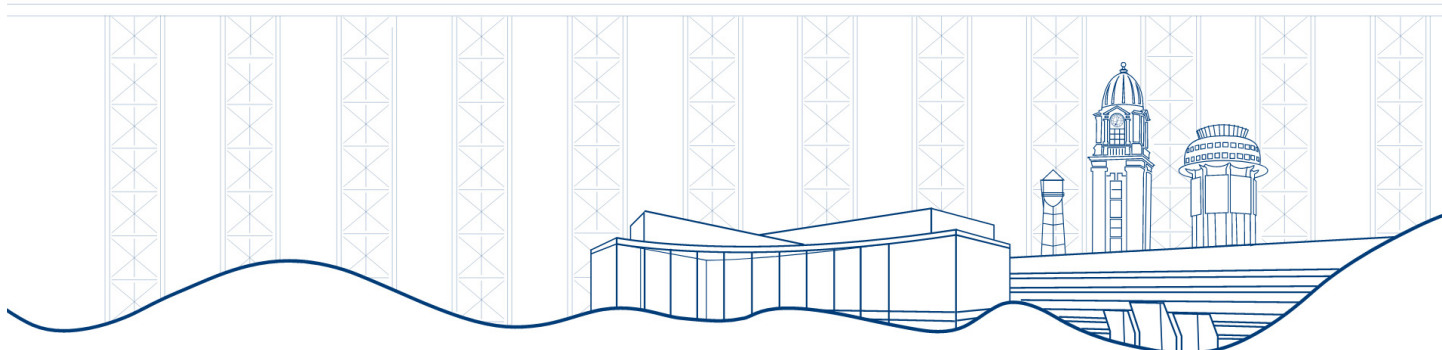
#### What supports are available to students?

**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

### Program Requirements (20 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. Human Resources and Labour Relations 2030 - Introduction to Organizational Behaviour
- \_\_\_\_\_ 7. Human Resources and Labour Relations 3050 - Human Resource Management
- \_\_\_\_\_ 8. Management 1500 - Fundamentals of Business
- \_\_\_\_\_ 9. Management 2070/Economics 2070 - Operations and Quantitative Management
- \_\_\_\_\_ 10. Management 3062 - Information Systems and Data Analytics
- \_\_\_\_\_ 11. Marketing 2020 - Marketing
- \_\_\_\_\_ 12. Economics 1010 - Introduction to Microeconomics
- \_\_\_\_\_ 13. Economics 1012 - Introduction to Macroeconomics
- \_\_\_\_\_ 14. Statistics 1770 - Introduction to Probability and Statistics
- \_\_\_\_\_ 15. **One of:**
  - \_\_\_\_\_ Economics 2900 - Economics and Business Statistics
  - \_\_\_\_\_ Statistics 2780 - Statistical Inference
- \_\_\_\_\_ 16.-19. **Four 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 4430 - Financial Management
  - \_\_\_\_\_ 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
- \_\_\_\_\_ 20. **One of the following with Indigenous content and a Fine Arts and Humanities designation:**
  - \_\_\_\_\_ Any course from the Indigenous Governance and Business Management (IGBM) subject codes list with a Fine Arts and Humanities designation (see **School of Liberal Education** in the 2024/2025 University of Lethbridge Calendar, [www.ulethbridge.ca/ross/academic-calendar](http://www.ulethbridge.ca/ross/academic-calendar))
  - \_\_\_\_\_ Any course from the Indigenous Studies (INDG) subject codes list with a Fine Arts and Humanities designation (see **School of Liberal Education** in the 2024/2025 University of Lethbridge Calendar, [www.ulethbridge.ca/ross/academic-calendar](http://www.ulethbridge.ca/ross/academic-calendar))
  - \_\_\_\_\_ 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

### 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:

- \_\_\_\_\_ Successful completion of at least 20 courses (60.0 credit hours) and a 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).
- \_\_\_\_\_ 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; and when required 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 diploma requirements.
- \_\_\_\_\_ All diploma requirements must be completed within 10 years after acceptance into the Dhillon School of Business.
- \_\_\_\_\_ Residence Requirement: Students must successfully complete at least 10 courses 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.

### Optional Minor:

For information about minors see **Minors** in the 2024/2025 University of Lethbridge Calendar, [www.ulethbridge.ca/ross/academic-calendar](http://www.ulethbridge.ca/ross/academic-calendar). Consult with an Academic Advisor if you wish to add a minor to your program.

#### 1.-6. Required Courses

- \_\_\_\_\_ 1. \_\_\_\_\_
- \_\_\_\_\_ 2. \_\_\_\_\_
- \_\_\_\_\_ 3. \_\_\_\_\_
- \_\_\_\_\_ 4. \_\_\_\_\_
- \_\_\_\_\_ 5. \_\_\_\_\_
- \_\_\_\_\_ 6. \_\_\_\_\_

### 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
- Economics 1012
- Management 1500
- Statistics 1770

#### First Year (Term 2)

- Accounting 2400
- Finance 3040
- Human Resources and Labour Relations 2030
- Marketing 2020
- One of: Economics 2900 or Statistics 2780

#### Second Year (Term 1)

- <sup>1</sup> Finance Elective
- <sup>1</sup> Finance Elective
- Finance 3412
- Finance 3470
- <sup>2</sup> Indigenous Content Requirement

#### Second Year (Term 2)

- <sup>1</sup> Finance Elective
- <sup>1</sup> Finance Elective
- Human Resources and Labour Relations 3050
- Management 2070/Economics 2070
- Management 3062

- 1. Refer to the 'Four of' list in the preceding major requirements.
- 2. Refer to the list of Indigenous Content courses in the preceding 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: _____	Advisor: _____ Date: _____