



PROGRAM PLANNING GUIDE



Name: _____

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Bachelor of Business Administration

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: 2025/2026 - 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 Business Administration

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.

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

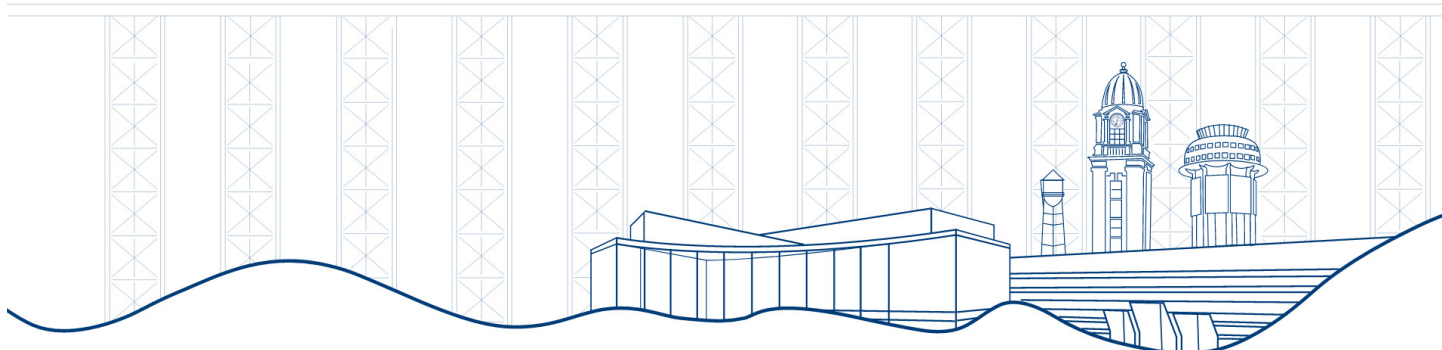
What supports are available to students?

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



Version: February 11, 2025

Contact an Academic Advisor (www.ulethbridge.ca/ross/academic-advising) for advising information

This is a planning guide and not a graduation check or guarantee of course offerings. You should have a program check done in your final year of studies. Students are responsible for ensuring they have met program requirements. This guide should be used in conjunction with the University of Lethbridge Academic Calendar, which is the final authority on program requirements and academic regulations.



PROGRAM REQUIREMENTS (2025/2026)

Required courses and notes

Core Requirements (18 Courses)

- _____ 1. Economics 1010 - Introduction to Microeconomics
- _____ 2. Economics 1012 - Introduction to Macroeconomics
- _____ 3. Management 1500 - Fundamentals of Business
- _____ 4. Statistics 1770 - Introduction to Probability and Statistics
- _____ 5. Marketing 2020 - Marketing
- _____ 6. Human Resources and Labour Relations 2030 - Introduction to Organizational Behaviour
- _____ 7. Management 2070/Economics 2070 - Operations and Quantitative Management
- _____ 8. Management 2081 - Professional Communications Skills
- _____ 9. Accounting 2100 - Introductory Accounting
- _____ 10. Accounting 2400 - Management Accounting
- _____ 11. Management 3031 - Managing Responsibly in a Global Environment
- _____ 12. Finance 3040 - Finance
- _____ 13. Human Resources and Labour Relations 3050 - Human Resource Management
- _____ 14. Global Business 3650 - Introduction to Global Business
- _____ 15. Management 4090 - Management Policy and Strategy
- _____ 16. **One of:**
 - _____ Management 3062 - Information Systems and Data Analytics
 - _____ Accounting 3171 - Accounting Information Systems and Data Analytics
 - _____ Management 3622 - Visual Analytics
- _____ 17. **One of:**
 - _____ Writing 1000 - Introduction to Academic Writing
 - _____ English 1900 - Introduction to Language and Literature

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 required in order to meet Liberal Education requirements.

- _____ 18. **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
 - _____ 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
 - _____ Indigenous Health 1000 - Introduction to Indigenous Health
 - _____ Liberal Education 1850 - Conversational Indigenization: Reconciling Reconciliation
 - _____ ¹ Political Science 3215 - Indigenous Peoples and Local Government in Canada

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Major Requirements (10 Courses)

- _____ 19. Finance 3412 - Fundamentals of Investments
- _____ 20. Finance 3470 - Corporate Finance
- _____ 21. Finance 4430 - Financial Management
- _____ 22. Economics 3030 - Managerial Economics
- _____ 23. Mathematics 1510 - Calculus for Management and Social Sciences
- _____ 24. **One of:**
 - _____ Economics 2900 - Economics and Business Statistics
 - _____ Statistics 2780 - Statistical Inference
- _____ 25. **One of:**
 - _____ Finance 4421 - Financial Institutions and Markets
 - _____ Finance 4451 - Derivative Securities Markets
- _____ 26.-28. **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 3620 - Blockchain Applications in Business
 - _____ 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

Note: Students who choose an optional Finance Concentration will replace the "Three of" requirement, plus one of the 3000 or 4000-level electives, with the concentration course requirements. See the "Finance Concentration" section.

Electives (12 Courses)

Minor courses may fill electives below where applicable.

- _____ 29.-34. Six 3000 or 4000-level electives (from any faculty/school)
 - _____ 29. _____
 - _____ 30. _____
 - _____ 31. _____
 - _____ 32. _____
 - _____ 33. _____
 - _____ 34. _____
- _____ 35.-40. Six electives, which should be chosen to ensure completion of the Liberal Education List Requirement (see **School of Liberal Education** in the 2025/2026 University of Lethbridge Calendar, www.ulethbridge.ca/ross/academic-calendar); remaining electives are open to any faculty/school.
 - _____ 35. _____
 - _____ 36. _____
 - _____ 37. _____
 - _____ 38. _____
 - _____ 39. _____
 - _____ 40. _____

Notes:

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



PROGRAM REQUIREMENTS (2025/2026)

Required courses and notes

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 40 courses (120.0 credit hours) with cumulative and graduation grade point averages of at least 2.00. To determine graduation grade point averages, see **Dhillon School of Business, Graduation** in the 2025/2026 University of Lethbridge Calendar, www.ulethbridge.ca/ross/academic-calendar.
- _____ A minimum grade of 'C-' is required in all Dhillon School of Business courses (ACCT, AGEM, FINC, GLBU, HRLR, IGBM, 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.
- _____ All degree requirements must be completed within 10 years after acceptance into the Dhillon School of Business.
- _____ A maximum of 12 courses (36.0 credit hours) may be completed at the 1000 level (or lower) for credit towards the degree, excluding Activity courses (PHAC and MUSE) and courses numbered 0520 to 0530.
- _____ A maximum of 6.0 credit hours in Activity courses may be taken for credit towards the degree.
- _____ Completion of the Liberal Education List Requirement.
- _____ Residence Requirement: Students must successfully complete at least 20 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 University of Lethbridge: Finance 3412, Finance 3441, Finance 3460, Finance 3480, Finance 4421, Finance 4430, Finance 4451.

Finance Concentration (optional)

If students wish to further specialize within the field of Finance, they may choose a concentration in Financial Planning. A concentration is not required. Students who choose a concentration will replace the "Three of" finance course requirement plus one of the "Six 3000 or 4000-level electives" with the four courses required for the concentration, as indicated.

Note: Concentration courses may be offered only once a year, in alternating years, or not at your campus.

a. Financial Planning

- _____ Finance 3480 - Personal Finance I
- _____ Finance 4480 - Personal Finance II
- _____ Accounting 3151 - Introduction to Tax

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 3490 - FinTech
- _____ Finance 3600 - Machine Learning in Business and Finance
- _____ Finance 3620 - Blockchain Applications in Business
- _____ 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

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Liberal Education List Requirement

Only four courses (12.0 credit hours) in total may be counted from any one discipline toward the Lib Ed Requirement. Disciplines are identified by separate course subject codes. Cross-listed courses count toward the limit for both disciplines (e.g. IGBM 3250/INDG 3250 counts toward the limit for Dhillon School of Business courses and Indigenous Studies).

Only four courses (12.0 credit hours) in total from the Faculty of Education (EDUC), Faculty of Health Sciences (ADCS, HLSC, INHL, NURS, PUBH, and TREC), and the Dhillon School of Business (ACCT, AGEM, FINC, GLBU, HRLR, IGBM, MGT, and MKTG) may be counted towards the Lib Ed Requirement.

To determine if a course has a Liberal Education designation, see School of Liberal Education in the 2025/2026 University of Lethbridge Undergraduate Calendar, www.ulethbridge.ca/ross/academic-calendar.

1.-4. List I: Fine Arts and Humanities

- _____ 1. _____
- _____ 2. _____
- _____ 3. _____
- _____ 4. _____

5.-8. List II: Social Science

- _____ 5. _____
- _____ 6. _____
- _____ 7. _____
- _____ 8. _____

9.-12. List III: Science

- _____ 9. _____
- _____ 10. _____
- _____ 11. _____
- _____ 12. _____

Optional Minor: _____

For information about minors see **Minors** in the 2025/2026 University of Lethbridge Calendar, 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. _____



RECOMMENDED SEQUENCING PLAN (2025/2026)

Recommended Course Sequence

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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

Accounting 2100
Economics 1010
Economics 1012
Human Resources and Labour Relations 2030
Management 1500
Marketing 2020
Mathematics 1510
Statistics 1770
One of: Writing 1000 or English 1900
Elective - Open

Second Year

Accounting 2400
One of: Economics 2900 or Statistics 2780
Finance 3040
Human Resources and Labour Relations 3050
Global Business 3650
Management 2070/Economics 2070
Management 2081
¹ Indigenous Content Requirement
One of: Accounting 3171, Management 3062, or Management 3622
Elective - Open

Third Year

² Finance Elective
² Finance Elective
Finance 3412
Finance 3470
Economics 3030
Management 3031
Elective - 3000/4000 level
Elective - 3000/4000 level
Elective - 3000/4000 level
Elective - Open

Fourth Year

² Finance Elective
Finance 4430
One of: Finance 4421 or Finance 4451
Management 4090
Elective - 3000/4000 level
Elective - 3000/4000 level
Elective - 3000/4000 level
Elective - Fine Arts & Humanities
Elective - Fine Arts & Humanities
¹ Elective - Open

1. Refer to the list of Indigenous Content courses in the preceding core requirements. Students who take an Indigenous Content course that does not have a Fine Arts and Humanities designation must replace one open elective with a Fine Arts and Humanities.
2. Refer to the 'Three of' list in the preceding major requirements. Students who choose an optional concentration will replace the "Three of" requirement, plus one of the 3000 or 4000-level electives, with the concentration course requirements. See the "Finance Concentration" section.

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)	
☐ will be met upon successful completion of _____ currently enrolled courses	☐ have been met
U of L GPA: _____ Grad GPA: _____ Co-op: _____ Honours Thesis: _____	
Advisor: _____ Date: _____	Advisor: _____ Date: _____