Abilene Christian University

Application for a New Course v10.5

Course ID ***Subject and Number***	Fin 434
Date APPROVED	
Date DENIED	

I. Systems and Catalog Information Complete each item.

1	Course Developer	Terry Pope
2	Course Teacher	Terry Pope
3	Course Title	Portfolio Management
4	Course Abbreviation (if title is over 30 characters)	
5	College	COBA
6	Department	Accounting and Finance
7	Number of Credit Hours	3
8	Is the course Fixed Credit or Variable Credit?	Fixed
9	Is the course repeatable?	Yes
10	Maximum number of times course may be repeated	3
11	Maximum number of hours credit	3
12	Explanation for variable credit	
13a	Course contact hours - LEC	3
13b	Course contact hours - Lab	
13c	Course contact hours - Practicum	
13d	Course contact hours - Seminar	
13e	Course contact hours - Studio	
13f	Course contact hours - Online	
13g	Course contact hours - Colloquium	
13h	Course contact hours – Field Experience	
13j	Course contact hours - Internship	
13k	Course contact hours - Research	
13m	Course contact hours - Workshop	
13n	Course contact hours – Other (specify)	
14	Instructor Workload	9 hours
15	Grade Mode (check all appropriate):	_x__Standard ___Credit/No Credit (undergrad only)
16	Maximum Enrollment	
17	**Catalog Description** (50 words or less)	Each student will use valuation techniques to select common stocks to comprise a portfolio. The performance of each portfolio will be compared to that of other students and to a benchmark. Each student will make five presentations to the class

		regarding their portfolio's composition and performance. Collectively, the students will function as an Investment Committee in managing a class portfolio.
18	List any prerequisites (course/s, test scores, class standing, major, etc.)	Fin 310 with a grade of at least C
19	List any co-requisites	
20	If the course is cross listed, specify the Course ID(s) MUST have signature in Section V off all Department Chairs	
21	Does this course have any special student costs? Yes/No *Attach a <u>completed</u> "Request to Add or Change Course Fees" form. Describe in section IV-F.*	No
22a	How often will it be offered? **Fall**	Yes
22b	How often will it be offered? **Spring**	Yes
22c	How often will it be offered? **Summer**	No
23	Frequency? All, odd, or even years?	All
24	First semester this course will be offered *New courses may not be taught under their approved course ID until they appear in the catalog, therefore, no earlier than the coming fall.*	Fall 2015
25	List course/s that should be deleted, include the last semester for course/s being deleted *A course cannot be deleted when it is a requirement in a degree plan in any department.*	
26	Is this course required for a degree/s? Yes/No *If "Yes," attach a revised degree plan(s) reflecting the placement of the new course.*	No
27	Should the addition of this course be retroactively applied to the degree plan it supports? Yes/no and explain	No
28	Has this course been offered as a Special Topics course? Yes/No *If "Yes," specify the Course ID and enrollment for each term it was taught.* *(Note: New courses are NOT required to be taught as Special Topics courses prior to being approved. However, courses may be taught once as Special Topics before it is proposed. See the Course Descriptions section of the Catalog for details.)*	Yes Fin 440 Fall 2012 – 8 Spring 2013 – 12 Fall 2013 – 7 Spring 2014 – 9 Fall 2014 – 12 Spring 2015 - 5

29	List any courses in which content overlaps the proposed course. (Course ID and Name) *Attach statement from instructor/dept chair of existing course justifying the new offering in Section IV-D.*	

II. Curriculum

1	**Degree Plan** Explanation of how this course affects degree requirements.	Elective
2	**Justification** State the justification for adding this course to the current curriculum. Represent the need.	Several students wish to pursue a career in money management. This course is designed to equip a student with both the analytical and communication skills needed in such a career.

III. Course Design

1. Audience and Course Goal

1	Describe the intended audience, including prerequisite skills.	This course will be good for students that wish to pursue a career in money management, such as with a mutual fund firm, a bank trust department or a personal financial planning organization. Given the prevalence of self-managed retirement plans in today's world, many students could benefit from this course. While the course it intended primarily for Financial Management majors, others are welcome and no prior knowledge beyond what is attained in the prerequisite course is assumed.

2	State the overarching course goal(s) in performance terms.	Construct a portfolio of common stocks that performs well versus peers and a market benchmark, and successfully investment ideas to others

2. Competencies and Measurements

	Competency	Measurement
1	Students will be able to use financial statements to produce ratios that are commonly used to value common stocks.	Exams and oral presentations
2	Students will be able to assemble and manage a portfolio of common stocks, with the portfolio's performance compared to a market benchmark.	Morningstar Direct's portfolio management facility
3	Students will be able to prepare and present investment recommendations to the Investment Committee in a professional, effective and convincing manner.	Oral presentations
4	Students will be able to write short reports regarding the performance of their portfolio that would be suitable to send to a client.	Weekly written reports
5	Students will be able to participate in and influence the outcome of group decisions.	Daily meetings of the Investment Committee
6		
7		
8		
9		

3. Text and Resources

1. Give the full publication information of the textbook/s and other required resources and outside readings.
2. For **combined undergraduate/graduate** courses, make two lists:
   a. full publication information; label **Undergraduate**.
   b. full publication information; label **Graduate**. Indicate number of pages required.

No textbook is required

IV. Supporting Documentation

Supporting documents must accompany proposal prior to preliminary approval by chair and dean.

	1	**Library** — Submit new course application and syllabus to the Dean of the Library. Consult with the director and establish a deadline for completion of the library report. **Attach** the signed copy of the Library report.
	2	**Instructional Design** — The application and syllabus must be reviewed by the Adams Center. **Attach** a copy of the Adams Center Review Letter.
	3	**Content Overlap** — Include one document for each course you listed in Section I-I. **Attach** statement from instructor/dept chair of existing course justifying the new offering.
	4	**Departmental Resources** — List the resources that support the course and are available only through the department, if applicable. **Attach** the list of the holdings and the location/s.
	5	**Resources** — List resources (other than library or departmental resources) that are needed to support this course (computers, lab equipment, other technology, etc.). **Attach** a complete list of all items and indicate possible sources or estimated cost of each. List the sources of any needed funds.
	6	**Expenses** — List additional expenses needed to implement this course (full-time or part-time faculty, graduate or lab assistants, student employees, travel, special student costs, room renovation, storage facility, etc.). **Attach** a complete list of all items, the estimated cost of each and the source of the funds.
	7	**Justification — Attach** all documents referred to in Section II-2
	8	Syllabus — **Attach** the syllabus for the course based upon the anticipated first-semester offering.
	9	Provide documentation for all additional attachments here

V. Preliminary Approvals

All supporting documentation has been assembled and attached to this application. I believe this course is ready to be presented to appropriate councils. We have a plan to fund this new course.

Course Number and Name: Fin 434 Portfolio Management

Primary Department

John D Neill

Department Chair

2/6/15

Date

Dean of the College

2/9/15

Date

Cross-listing Department *Add more lines if multiple departments are cross-listing*

Department Chair

Date

Dean of the College

Date

Cross-listing Department *Add more lines if multiple departments are cross-listing*

Department Chair

Date

Dean of the College

Date

VI. Actions *Place all actions on one page.*

Course ID: Fin 434

Course Title: Portfolio Management

1. **College Academic Council**: (for all courses)
   Note: Insert additional lines for College Academic Council action for each college involved in cross-listed courses.

Approved ✓ Denied___ ____________________ 2/9/15
College Dean or Director Date

Approved ✓ Denied___ David Parker 2-16-15
College Dean or Director Date

2. **Graduate Council**: (for graduate level courses)

Approved ___ Denied ___ ____________________ __________
Dean of Graduate School Date

3. **Teacher Education Council**: (when applicable)

Approved ___ Denied ___ ____________________ __________
TEC Chair Date

4. **University General Education Council**: (when applicable)

Approved ___ Denied ___ ____________________ __________
Provost's designee Date

5. **University Undergraduate Academic Council**: (*undergraduate level courses)*

Approved ___ Denied ___ ____________________ __________
Vice Provost Date

6. **Academic Provost**: (for all courses)

Approved ___ Denied ___ ____________________ __________
Provost Date

7. **President of the University**: (for all courses)

Approved ___ Denied ___ ____________________ __________
President Date

Attach notes, comments, or conditions from appropriate councils:

Departmental Resources

The College of Business provides access, through a subscription, to Morningstar Direct. This comprises a vast financial data base and sophisticated analytical tools for measuring portfolio performance. The user interface software is available on all computers in the labs in COBA and may also be installed on a student's personal computer.

Other Resources

The Value Line Investment Survey is available online through the Abilene Public Library. Numerous other excellent resources are available free on the internet.

The above resources are already in place. No new costs are expected with this application.