Professor/Instructor: R. Scott Wheeler, M.B.A. - Adjunct Professor
Live Class Time: Tuesday evenings at 6:30PM. I am will occasionally have to move the classes to an alternate date and time due to my business schedule. Class attendance is not mandatory but highly encouraged and rewarded.
Place: On-Line Course
Office Hours: Tuesday after class, Wednesday 7:00 PM to 8PM or by appointment
Phone: 214-693-8802 (Cell)
E-mail: ronald.wheeler@tamuc.edu

REQUIRED TEXTS/MATERIALS:
2. Microsoft Excel: For the course, a computer spreadsheet software (MS Excel, Lotus, or equivalent) should be utilized. Expertise in using such spreadsheet programs is essential in the corporate world and attaining basic skill in this type of software will be emphasized and incorporated into class coursework and grading. I will use Excel exclusively and the answers will be based on this software. It is the student’s responsibility to be or become fluent in the basic functions in Excel.
3. Calculator: You do not really need a specific calculator. Any handheld calculator that has basic functions may be useful to you in this course. I personally use the calculator on my smart phone if I ever need one. All complicated financial calculations can be accomplished in Excel. However, you may prefer and find it handy to utilize a financial calculator with specific functions such as “n”, “i”, “PV”, PMT”, “FV” or on the calculator’s face. Many professors at TAMUC recommend the TI BA-II or a comparable calculator. I will not be teaching from any calculator and it is the student’s responsibility to be fluent in the tools of their choosing.
4. Prerequisites: It will be extremely helpful to you in this class if you have your prerequisites fulfilled.

COURSE DESCRIPTION:
This course will focus predominately on a basic to intermediate comprehension of corporate finance and business management. It will be taught from my perspective of over 25 years of senior level financial management positions, including that of Chief Financial Officer of multiple companies in multiple industries. We will focus on some very practical things. However, we will not neglect the more academic aspects of financial management. We will start with the basic legal and tax structures of businesses and move on from there to topics such as; why businesses behave the way that they do; how to understand the health of a business by analyzing its financial statements and more. We will also focus on the various sources of
capital and their characteristics. We will also cover financial fundamentals such as Time Value of Money, Financial Markets, Budgets and Capital Allocation.

**MAJOR TOPICS COVERED:**
Upon completion of this course, students should be familiar with the following:

1. Major Forms of Business Organizations
2. Shareholder Wealth Maximization
3. Basic Accounting Statements
4. Ratio Analysis
5. Capital Allocation and Budgeting
6. Types and Sources of Capital
7. Cost of Capital
8. Calculation of Present and Future Values
9. Risk and Return
10. Stocks, Bonds and Their Valuation


**BASIC ACTIVITY GUIDE:**
The basics of the activities in this course are structured to simulate how a modern business functions. Therefore, something will be expected of you each and every week. This will include:

- **READ:** Each week you will be required to read a chapter of the textbook.
- **LECTURES:** There will be a lecture each week live on Tuesday at 6:30.
  - Attendance is not mandatory but highly encouraged and will be rewarded.
- On alternating weeks, you will have homework one week and then a quiz covering two chapters the next week.
- **HOMEWORK:** Homework will be due each Tuesday at 6:30PM.
  - Late work will not be accepted unless approved in advance.
  - Requests received at 6:29PM on Tuesday will be frowned upon.
  - Just like the business world, how would your boss at work think if he was expecting something and you told him one minute before he expected it, that it was not going to be delivered?
  - Right. It would be frowned upon.
- **QUIZZES:** The quizzes will be open for one week and one week only.
  - They will be open for one week beginning on Tuesday nights at 6:31PM and closing the following Tuesday at 6:30PM.
  - You can take the quiz anytime you want to during that week.
  - You can stop and save you work and go back and complete it at any time you desire during that week.
  - Once again in most modern businesses, companies want production no matter when the employee actually does the work.
  - Therefore, do it whenever it fits your schedule but please get it finished on time.
  - One week is more than ample time for these simple quizzes.
- **FINAL EXAM:** Will be comprehensive and cover the entire course.

**ATTENDANCE/PARTICIPATION:**
Attendance is highly encouraged. In determining the final grades, attendance, class participation and active on-going dialogue of the course material will be considered. There will be lecture content that is **NOT** included in the textbook. You will be responsible to know that material as well. **Consistency will be rewarded** (you will hear this often from me). You will likely **NOT** pass this class without **weekly** reading (prior to class), class attendance, and participation either live or via email, etc. I will also adjust the class schedule as needed for major holidays, etc. as needed. The class will be conducted at the regularly scheduled time as much as possible. However, those times may have to vary somewhat due to my work travel schedule. You will need to be actively checking your school email address as part of the class.

**TEACHING PROCEDURES:**
You can most likely read the book and take the exams and quizzes and be most of the way to passing this class. However, you will need to attend or review the lectures and/or participate with the class and me on the subject matter. This may include electronic communications such
as emails, discussion groups, chats, etc. Many of the issues covered in the readings will be discussed in class, however; all the areas covered in the readings will not be part of class discussion. I also will present the concepts in smaller, more digestible ways and we will be doing things in small steps consistently over the semester. As practical, I hope to bring in experts in certain fields to provide supplemental lectures on the subject of the day. You will be responsible to know this material as well. The class plan calls for alternating weeks of a homework assignment one week and then a short quiz the next. I will post the homework assignments in Dropbox or email them as appropriate.

**EXAMS:**
There will be a short quiz required after each major subject area. These should be fairly simple and straightforward if you are keeping up with the pace of the class. You will have a major final exam that covers all of the material covered in the course. You will be responsible for information from class discussion, required readings, and homework. **No makeup exams or quizzes will be given** unless for a University allowed excused absence. **Exam windows will be open for approximately one week.** They will all be due on Tuesday at 6:30PM. You will have ample time to complete these on your schedule. You will only be given the opportunity for make-up work if you request it in advance of the deadline. Make up work will be harder than the quiz.

**HOMEWORK ASSIGNMENTS**
There will be homework assignments, most often a short spreadsheet to complete for most chapters we will be covering. Completing these in a timely manner will certainly improve your grade in this class as significant points will be assigned to these. Homework assignments will be made in the lecture, most often at the end. **All Homework and Quizzes must completed by Tuesday at 6:30PM.** If you cannot make this deadline and need a different deadline, you need to clear this with me in advance. This is to replicate the process in a business environment as much as possible.

**PARTICIPATION:**
This course is based on the belief that all students will benefit through taking an active role in the learning process. Students are expected to attend class regularly through coming to the live lectures or listening to the archived lectures. Lectures will be most beneficial when you complete assigned readings before topics are discussed in class. Assignments must be read prior to the appropriate class meeting. Active participation in Discussion topics will be required.

**GRADING INFORMATION:**
**TOTAL POINTS 1000**
Final Grades will be determined by the following schedule:
A: 900 – 1000 points
B: 800 – 899 points
C: 700 – 799 points
Grades of "I" (incomplete) will not be given to students who merely do not come to class, or have failed to satisfactorily complete the course. Refer to the University's policy regarding incompletes for further information.

### COURSE OUTLINE:

**Learning Statement for FIN 304**

<table>
<thead>
<tr>
<th></th>
<th>Unsatisfactory</th>
<th>Emerging</th>
<th>Proficient</th>
<th>Exemplary</th>
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<tbody>
<tr>
<td>Demonstrate an understanding of the fundamental concepts of</td>
<td>Student cannot demonstrate an understanding any of the fundamental</td>
<td>Student can demonstrate some understanding of the fundamental</td>
<td>Student can demonstrate understanding of most of the fundamental</td>
<td>Student can demonstrate understanding of all of the fundamental</td>
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<tr>
<td>corporate finance and its principles and</td>
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<td><strong>Week</strong></td>
<td><strong>Lecture Topic</strong></td>
<td><strong>Leading Topic</strong></td>
<td><strong>Homework</strong></td>
<td><strong>Test</strong></td>
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<td>1-Sep</td>
<td>Introduction, Basic Excel &amp; Chapter 1</td>
<td>Excel</td>
<td>Entity Type</td>
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<tr>
<td>8-Sep</td>
<td>Chapter 1 Continued</td>
<td>Entities/Hierarchy</td>
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<td>15-Sep</td>
<td>Chapter 2</td>
<td>Financial Markets/Entities</td>
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<td>22-Sep</td>
<td>Chapter 3</td>
<td>Financial Statements</td>
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<td>29-Sep</td>
<td>Chapter 4</td>
<td>Taxes, Ratios</td>
<td>Ratios</td>
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<td>6-Oct</td>
<td>Chapter 5</td>
<td>Time Value of Money</td>
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<td>13-Oct</td>
<td>Chapter 10</td>
<td>Cost of Capital</td>
<td>Shark Tank</td>
<td>50</td>
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<td>20-Oct</td>
<td>Chapter 11</td>
<td>Capital Budgeting</td>
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<td>27-Oct</td>
<td>Chapter 6</td>
<td>Interest Rates</td>
<td>Discussion</td>
<td>50</td>
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<td>3-Nov</td>
<td>Chapter 7</td>
<td>Bonds</td>
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<td>10-Nov</td>
<td>Chapter 8</td>
<td>Risk and Rates of Return</td>
<td>Discussion</td>
<td>50</td>
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<td>17-Nov</td>
<td>Chapter 9</td>
<td>Stocks and their Valuation</td>
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<td>75</td>
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<td>24-Nov</td>
<td>Thanksgiving Break</td>
<td>NO CLASS</td>
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<td>1-Dec</td>
<td>Chapter 15</td>
<td>Working Capital Management</td>
<td>Discussion</td>
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<td>8-Dec</td>
<td>Chapter 16</td>
<td>Forecasting</td>
<td>Simple Model</td>
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<td>15-Dec</td>
<td>Final Exam</td>
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<td>200</td>
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<td><strong>TOTAL</strong></td>
<td></td>
<td></td>
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<td><strong>1000</strong></td>
</tr>
</tbody>
</table>
---|---|---|---|---|
Understand and apply valuation techniques of securities, projects and corporations. | Student cannot demonstrate an understanding any of the fundamental concepts of corporate finance and its principles and methods. | Student can demonstrate some understanding of the fundamental concepts of corporate finance and its principles and methods. | Student can demonstrate understanding of most of the fundamental concepts of corporate finance and its principles and methods. | Student can demonstrate understanding of all of the fundamental concepts of corporate finance and its principles and methods. |
Demonstrate an understanding and show ability to measure financial decisions in a risk/return environment. | Student cannot demonstrate an understanding any of the fundamental concepts of corporate finance and its principles and methods. | Student can demonstrate some understanding of the fundamental concepts of corporate finance and its principles and methods. | Student can demonstrate understanding of most of the fundamental concepts of corporate finance and its principles and methods. | Student can demonstrate understanding of all of the fundamental concepts of corporate finance and its principles and methods. |

FIN 304 is a core course for BBA.

**ACADEMIC INTEGRITY/PLAGIARISM:**
All academic work must meet the standards contained in A Culture of Honesty: Policies and Procedures on Academic Honesty. Students are responsible for informing themselves about those standards and for observing the University Honor Code. Plagiarism occurs when a student submits work that is not his or her own. This includes copying from printed materials, websites, or from other people. All students are expected to turn in work that has been completed individually, unless otherwise informed by the instructor. Any assignment containing plagiarized material will automatically be graded as zero. The instructor will use the available technology at
hand to determine if you have or appeared to have cheated. You are required to access all data and lectures available to you during the semester.

**ADA:**
The Americans with Disabilities Act (ADA) is a federal anti-discrimination statute that provides comprehensive civil rights protection for persons with disabilities. Among other things, this legislation requires that all students with disabilities be guaranteed a learning environment that provides for reasonable accommodation of their disabilities. If you have a disability requiring an accommodation, please contact:

**Office of Student Disability Resources and Services**
Texas A&M University-Commerce
Halladay Student Services Building
Room 303 A/D
Phone (903) 886-5150 or (903) 886-5835
Fax (903) 468-8148
StudentDisabilityServices@tamu-commerce.edu

**CIVILITY IN THE CLASSROOM:**
Students are expected to assist in maintaining a classroom environment that is conductive to learning. Inappropriate behavior shall result in “minimally” a request to leave the online classroom.

**POLICY ON LATE WORK:**
Late work WILL NOT BE ACCEPTED without a university excused absence as defined by Texas A&M – Commerce Rules and Procedures 13.99.99.R0.01. Note: keep a copy of your work - this protects you in the event of questions about missing assignments.

Excused absences include and are limited to:

- Pre-authorized religious holidays
- Participation in a required/authorized university activity
- Voting on Election Day
- Obligation of student at legal proceedings in fulfilling responsibility as a citizen
- Documented death in a student’s immediate family
- Verified illness – Resulting in Hospitalization or Long-Term Illness

**NOTE: THE COURSE SYLLABUS IS A GENERAL PLAN FOR THE COURSE. DEVIATIONS ANNOUNCED TO THE CLASS BY THE INSTRUCTOR MAY BE NECESSARY.**

This page must be completed and uploaded to the instructor in eCollege under the dropbox tab before the second class period. A typed signature will work if you cannot scan and upload.

COURSE: ____________________
INSTRUCTOR: ______________________________
NAME: __________________________________________

I have received, read and understand this syllabus as presented by the instructor and am clear as to the requirements and effort that will be required to succeed in this course.
Signature Date