

Executive Finance & FinTech

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2018-2019 Course Syllabus

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Course Description: The Executive Finance & FinTech program at STA is designed to prepare students for post-secondary studies and a career in finance and financial technology. We will focus on gathering knowledge and skills in these areas of finance: Personal and Corporate Finance, Retail and Commercial Banking, Investment Management and Accounting. Subsets underlying these specific fields will include studies in risk management, data analytics, wealth management, banking, fintech, financial modeling and statements and economics.

Instructional Philosophy: Students will be engaged in research, simulations, hands-on problem-solving and project-based learning, as well as field experiences such as job shadowing/internships while studying. We will begin units working individually and quickly move into collaborative team based projects. The instructor acts more as a facilitator and coach than a traditional teacher. Students will be able to apply their own critical thinking and communication skills to find solutions to real world problems. The instructor will meet with students individually on a weekly basis to assess progress and understanding of the concepts.

Essential Standards:

- 1. Recognize, Identify Patterns, and Draw Conclusions with Economic Concepts*
- 2. Identify, Assess and Synthesize financial information.*
- 3. Use, Organize and Create Financial Plans for Personal and Business Needs*
- 4. Distinguish the different types of financial risk and apply those concepts when making financial decisions.*
- 5. Measure, Interpret, and Analyze data from a variety of sources.*
- 6. Identify, Summarize, and Draw Conclusions of FinTech applications and their effect on the financial landscape.*
- 7. Demonstrate proper Professionalism, Communication, and Collaboration*
- 8. Assess and Analyze the different career options in the financial industry*

Major Assignments/Projects (1st Semester):

1. Wealth Management Project- *Students will present to industry partners in groups a wealth management proposal. Students will be responsible for synthesizing the knowledge and skills they learned with regards to economics, the equity and bond markets, and financial planning (balance sheets, budgeting, goal setting).*

2. Banking Project - *Students will present to industry partners in groups a commercial banking proposal. Students will be responsible for applying the knowledge and skills they learned with regards to the retail and commercial banking environment. They will be able to utilize critical thinking skills necessary for underwriting a lending proposal along with the ability to articulate different savings options for the small business owner and retail consumer.*

3. Insurance Project- *Students will present to industry partners in groups an overall insurance proposal to a prospect client. The students will be responsible for critiquing the overall financial picture for the small business owner and understand the importance of implementing an overall insurance plan (life, disability and property and casualty).*

4. Microsoft Excel- *Ongoing “assignment” throughout the semester. One of the outcomes for this course is for students to sit and pass the exam to earn their MOS Excel Expert Certification. Everyday we will dedicate a set amount of time working through tutorials. By the second semester we will utilize all the skills learned in the first semester to introduce financial modeling and forecasting tools through Microsoft Excel.*

5. Stock Market Game- *Students will participate in the Stock Market Game throughout the course of the year. This “game” will be a cornerstone for introducing new concepts along with refining research and analytical techniques. There will also be competitions that will be implemented throughout the school year.*

GRADING POLICY: Grades will be figured using the Summit Technology Academy approved grading scale. Grades are cumulative throughout the semester. Semester grades are computed as per the following weighted grading system:

1. Participation : 10%- 50 points
2. Assignments: 15%- 75 points
2. Projects:
 - A. Wealth Management- 10% - 50 points
 - B. Banking- 10% - 50 points
 - C. Insurance- 10% - 50 points
3. Exams (10): 20% - 100 points
4. Final Project: 25% - 125 points

The final project will be a cumulative proposal with all sections learned in the class being presented to a prospective client. Each team member will be assigned specific, real-life jobs with

a hypothetical scenario and client situation that they will have to create a proposal around utilizing the six steps in financial planning.

Note: Any assignment, be it a paper, quiz, etc., that is not turned in (hard copy and/or email) by the due date will result in a ZERO.

The following standardized grading scale is used for STA:

A = 95 -100	C = 73 - 76
A- = 90 - 94	C- = 70 - 72
B+ = 87 - 89	D+ = 67 - 69
B = 83 - 86	D = 63 - 66
B- = 80 - 82	D- = 60 - 62
C+ = 77 - 79	F = 59 & below (No Credit)

TUTORING/EXTRA HELP PLAN: STA utilizes a pyramid of interventions in order to increase the likelihood that students successfully meet the course requirements. Tutoring or extra help can be obtained by contacting the STA teacher through e-mail, phone or a student management system (such as Blackboard or Canvas). The teacher will provide either immediate help, set up a time to meet, or utilize an online video conference method.

ATTENDANCE POLICY: Regular attendance reflects dependability. The experience gained by student design teams is of paramount importance. Summit Technology Academy's policy may differ from that of the home school and will be in effect for the period of attendance at STA. A student shall be allowed no more than nine (9) absences, excused or unexcused, per semester in any one class. When a student reaches 9 days, the school will send an informational letter to the parents, regardless of prior contact by phone or conference. The letter serves as notification of the number and type of absences by the student in each class. On the tenth (10) absence, in any one class, the student will not earn credit for that class. Students will have the opportunity to work with their administrator or teacher to make up missed time prior to the end of the semester. If a student still has 10 or more absences at the conclusion of the semester, the student will be required to complete an attendance waiver appeal. A waiver to maintain full credit must be submitted by the end of the semester. This waiver should include documentation of illness, funeral, or family emergency from a medical doctor, dentist, minister, or other official source. The waiver should be turned into the attendance office.

ELECTRONIC GRADEBOOK/PARENT CONNECT WEBSITE: Grades are updated on a weekly basis. The Parent Connect website address is <http://pc.lsr7.net>

ACADEMIC LETTERING: Any student who has maintained a 4.0 GPA for both semesters of the STA course will receive an academic letter.

TARDY POLICY: A tardy will be issued in accordance with the student handbook. Students are on time if they are seated in the classroom at 0755/1150, not simply walking through the

classroom door. A tardy will result in a “0” on any daily opening activity/quiz. Take care of water-drinking and restroom needs BEFORE the class begins.

DRIVING PRIVILEGES: Driving to STA is a privilege and can be revoked at any time. Students are allowed to drive to STA as long as their sending school allows them to drive and a permit is onfile. Driving permits may be revoked if a student is frequently tardy, late to school, or exhibits irresponsible driving practices upon entering, or leaving STA, etc.

ELECTRONICS POLICY: No electronics or headphones are allowed in the classroom unless being used in the educational process or as directed by the instructor. Electronics should be placed in backpacks or purses and out of sight. Students are encouraged to interact and help one another when appropriate.

DAILY MATERIALS NEEDED:

1. 3 Ring Binder: Preferably 2” or larger.
2. 5 Notebooks
3. Scientific calculator. **HP-10bII** \$26 roughly on Amazon. I know how to use this one well.
4. Pencil(s) and pen(s).
5. Classroom Textbook: *Fundamentals of Corporate Finance*, 4th Edition Berk, DeMarzo & Harford ©2018