FIN 419 SYLLABUS - 0001

Course Information

Course: Financial Statement Analysis – Fin 419

Term: Spring 2011

Instructor: Charles C. Connely, IV, MBA, CCIM

Credit Hours: 3

Text: <u>Business Analysis & Valuation; Using Financial Statements</u> – Fourth Edition; Palepu & Healy; Thomson*South-Western Publishing; Hard cover edition.

Prerequisite: Fin 325 Financial Management

Meets: Tuesdays 7:00 pm. to 9:45 p.m. at the Law School in Room 3

Office: My office is at Block, room 405. I am usually in my office from 5:30 p.m. to

6:45 p.m. on Mondays through Wednesdays. E-mail: connelyc@umkc.edu

Course Description And Objectives

Financial Statement Analysis is designed to prepare the student to analyze, interpret and use financial techniques in reviewing corporate financial statements. Students will be required to prepare written industry reports, participate in group discussions analyzing financial reporting issues, prepare and present a detailed financial analysis of a public company along with acquiring the knowledge to understand the complete packet of financial statements as presented by corporate finance.

Some main objectives of the course are to:

- Develop a skilled framework to analyze financial statements using prior financial knowledge along with newly acquired financial analysis techniques.
- Obtain a strong understanding of each component of the principal financial statements distributed by corporations.
- Obtain the financial tools necessary to understand all aspects reported within financial statements.
- Learn to evaluate and present the financial results of a company both in peer group and written format.
- Develop knowledge regarding ratio analysis, trend analysis, earnings forecasting, bankruptcy, and financial predictors.
- Continue to develop communication skills necessary to be successful in working in the business environment.

Course Grading

Your class grade will be determined by the following weighted criteria:

Class assignments & problems	10%
Written Cases (3)	15%
Group presentation & report	15%
Exam 1	20%
Exam 2	20%
Final – Exam 3	20%

Class grading scale is as follows:

90% - 100%	Α
80% - 89%	В
70% - 79%	C
60% - 69%	D
0% - 59%	F

Optional +/- will be used in this class.

Course Policies

- A) Make-Up Exams / Assignments Missed exams and assignments must be made up no later than the next scheduled class period. There will be a 10% grade reduction for all late exams and assignments. In the event of an absence, students are responsible for obtaining any class lecture material from a fellow classmate.
- B) Academic Honesty The policy of UMKC concerning cheating and plagiarism will be strictly enforced.
- C) All course withdrawals must be completed through the Registration Center in the UMKC Administration Center. *Informing the instructor of intention to withdraw or ceasing to attend class does not constitute an official withdrawal.*

ADA Policy

If you have any questions, disability or desire accommodations under the Americans with Disabilities Act, contact the office of Disabled Student Services, 235-5696

Statement Regarding Modification of the Course Syllabus

All course requirements, course grading standards, and due dates for assignments for this course is subject to change at the discretion of the professor. Changes to the printed syllabus will be announced during a regularly scheduled class period.

Statement of Student/Instructor Responsibility

Students are responsible for meeting the standards of academic performance established for each course in which they are enrolled. The establishment of the criteria for grades and the evaluation of student academic performance are the responsibility of the instructor.

Grade Appeals

A copy of the Student Grade Appeal procedure is on file and can be obtained from the BA Division office, Room 334, in the Bloch School.

Class Schedule

<u>Date</u>	Topic/Assignment
January 11	Chapter 1 - Framework
	Financial statement review
January 18	Chapter 2 – Strategy Analysis
	Chapter 2 (continued)
January 25	Chapter 3 – Accounting Analysis
	Chapter 4 – Implementing Accounting Analysis
February 1	Case 1 Written class assignment & review
	Exam 1
February 8	Chapter 5 – Financial Analysis
	Chapter 5 (continued)
February 15	Chapter 6 – Prospective Analysis / Forecasting
	Chapter 7 – Prospective Analysis / Valuation
February 22	Chapter 7 (cont) & Chapter 8
	Case 2 Written class assignment & review
March 1	Exam 2
	Group Presentation Research
March 8	Chapter 9 Equity Security Analysis
	Chapter 10 – Credit Analysis
March 15	Bankruptcy - Altman Z – Score Model
	Chapter 11 – Mergers and Acquisitions
March 22	Case 3 Written class assignment
	Chapter 12 – Communication and Governance
March 29	Spring Break – no class
April 5	Group presentation research
April 12	Group 1 Presentation
	Group 2 Presentation
April 19	Group 3 Presentation
	Group 4 Presentation
April 26	Class Recap and Review
May 3	Final – Exam 3

- Additional assignments will be given during the semester.
- Class schedule may change as needed per instructor.