

## Financial Management

**MASY1-GC 1220 | 105 | Spring 2024 | 01/25/2024 - 05/02/2024 | 3 Credit**

**Modality:** In-person

**Course Site URL:** <https://brightspace.nyu.edu/>

### General Course Information

**Name/Title:** Alex Coelho | (He/Him)

**NYU Email:** acc17@nyu.edu

**Class Meeting Schedule:** 01/25/2024 - 05/02/2024/ Thursdays | 06:20pm -- 08:55pm

**Class Location:** Bldg:MIDC Room 1021

**Office Hours:** For appointments, please contact Alex - acc17@nyu.edu

### Description

This course covers current financial and managerial accounting methods and their function within the information system of decision making. Topics include accounting theory and concepts, financial statement analysis as well as financial analysis for evaluation and decision-making. The course also focuses on capital investment analysis, financial models, and the legal ramifications of technological advances in the finance industry. Students learn to apply financial management principles, techniques, and best practices to analyze a firm's finances. The course prepares students to study financial risk management and entrepreneurship.

### Prerequisites

N/A

### Learning Outcomes

At the conclusion of this course, students will be able to:

- Analyze financial statements utilizing generally accepted accounting principles (GAAP) to assess financial health of the organization and inform decision making
- Apply the Time Value of Money theory in making financial decisions and evaluating competing projects
- Apply the basics of financial markets in making financial decisions
- Apply knowledge of capital markets to meet a firm's capital needs and investment decisions Develop organizational financial plans using financial modeling techniques

### Communication Methods

Be sure to turn on your [NYU Brightspace notifications](#) and frequently check the "Announcements" section of the course site. This will be the primary method I use to communicate information critical to your success in the course. To contact me, send me an email. I will respond within 24 hours.

### Structure | Method | Modality

There are 14 session topics in this course. The session topics are organized into three (3) areas of study: 1) History, 2) Learning Principles, and 3) Instructional Design in Practice.

Active learning experiences and small group projects are key components of the course.

Assignments, papers, and exams will be based on course materials (e.g., readings, videos), lectures, and class discussions. Course sessions will be conducted synchronously on NYU Zoom, which you can access from the course site in [NYU Brightspace](#).

## **Expectations**

### Learning Environment

You play an important role in creating and sustaining an intellectually rigorous and inclusive classroom culture. Respectful engagement, diverse thinking, and our lived experiences are central to this course, and enrich our learning community.

### Participation

You are integral to the learning experience in this class. Be prepared to actively contribute to class activities, group discussions, and work outside of class.

### Assignments and Deadlines

Please submit all assignments to the appropriate section of the course site in [NYU Brightspace](#). If you require assistance, please contact me BEFORE the due date.

### Course Technology Use

We will utilize multiple technologies to achieve the course goals. I expect you to use technology in ways that enhance the learning environment for all students.

### Feedback and Viewing Grades

I will provide timely meaningful feedback on all your work via our course site in NYU Brightspace. You can access your grades on the course site Gradebook.

### Attendance

I expect you to attend all class sessions. Attendance will be taken into consideration when determining your final grade.

Refer to the [SPS Policies and Procedures](#) page for additional information about attendance.

## **Textbooks and Course Materials**

- FUNDAMENTALS OF FINANCIAL MANAGEMENT - Eugene Brigham and Joel Houston, 2022, 16<sup>th</sup> Edition, ISBN 978-0-357-51757-4
- Cases will be assigned

## **Grading | Assessment**

Your grade in this course is based on your performance on multiple activities and assignments. Since all graded assignments are related directly to course objectives and learning outcomes, failure to complete any assignment will result in an unsatisfactory course grade. All written assignments are to be completed using APA format and must be typed and double-spaced. Grammar, punctuation, and spelling will be considered in grading. Please carefully proof-read your written assignments before submitting them for a grade. I will update the grades on the

course site each time a grading session has been completed— typically three (3) days following the completion of an activity.

<u>DESCRIPTION</u>	<u>PERCENTAGE</u>
Assigned Activities and Case Analysis	20%
Participation	30%
Midterm Project	20%
Final Exam	30%
<b>TOTAL POSSIBLE</b>	<b>100%</b>

See the [“Grades” section of Academic Policies](#) for the complete grading policy, including the letter grade conversion, and the criteria for a grade of incomplete, taking a course on a pass/fail basis, and withdrawing from a course.

## Course Outline

**Start/End Dates:** 01/25/2024 - 05/02/2024 / Thursdays

**Time:** 06:20pm -- 08:55pm

**No Class Date(s):** Thursday - 3/21/2024

**Special Notes:** Spring Break 03/18/24 - 03/24/24

### Session 1, 01/25/24

Course Introduction

Syllabus Review

Chapter 01 – An Overview of Financial Management (Pages 1 - 25)

Chapter 02 – Financial Markets and Institutions (Pages 30 - 47)

### Session 2, 02/01/24

Chapter 03 – Financial Statements (Pages 64 – 77)

Chapter 04 – Analysis of Financial Statement (Pages 108 – 126)

### Session 3, 02/08/24

Chapter 05 - Time Value of Money (Pages 151 – 164)

Chapter 06 - Interest Rates (Pages 196 – 202)

### Session 4, 02/15/24

Chapter 07 – Bonds and their Value (Pages 232 – 235)

Chapter 08 – Risk and Rates of Return (Pages 273 – 281, and 377 – 380)

Case to be assigned

### Session 5, 02/22/24

Chapter 09 – Stocks and their Valuation (Pages 319 – 326)

Chapter 10 – The Cost of Capital (Pages 360 – 367, and 377 – 380)

Case to be assigned

**Session 6, 02/29/24**

Chapter 12 – Cash Flow Estimation & Risk Analysis (420 – 427, and 433 – 434)

Case to be assigned

**Session 7, 03/07/24**

**MIDTERM PROJECT**

**GROUP BALANCE SHEET ANALYSIS & PRESENTATION**

**Session 8, 03/14/24**

Chapter 14 – Capital Structure and Leverage (Pages 478 – 479, and 500 – 508)

Chapter 15 – Distributions to Shareholders (Pages 522 – 528)

**Session 9, 03/28/24**

Chapter 16 – Working Capital Management (Pages 558 – 564, and 577 – 588)

Case to be assigned

**Session 10, 04/04/24**

Chapter 17 – Financial Planning and Forecasting (Pages 599 – 614)

Case to be assigned

**Session 11, 04/11/24**

Chapter 18 – Multinational Financial Management (Pages 625 – 640, and 649 – 656)

Case to be assigned

**Session 12, 04/18/24**

Chapter 19 – Derivatives and Risk Management (Pages 663 – 673, and 668 – 670)

Chapter 21 – Mergers and Acquisitions (ALL)

**Session 13, 04/25/24**

Chapter 21 Mergers and Acquisitions (ALL)

Case to be assigned

**Session 14, 05/02/24**

**FINAL EXAM**

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**NOTES:**

The syllabus may be modified to better meet the needs of students and to achieve the learning outcomes.

The School of Professional Studies (SPS) and its faculty celebrate and are committed to inclusion, diversity, belonging, equity, and accessibility (IDBEA), and seek to embody the IDBEA values. The School of Professional Studies (SPS), its faculty, staff, and students are committed to creating a mutually respectful and safe environment (*from the [SPS IDBEA Committee](#)*).

## New York University School of Professional Studies Policies

1. Policies - You are responsible for reading, understanding, and complying with [University Policies and Guidelines](#), [NYU SPS Policies and Procedures](#), and [Student Affairs and Reporting](#).

2. Learning/Academic Accommodations - New York University is committed to providing equal educational opportunity and participation for students who disclose their dis/ability to the [Moses Center for Student Accessibility](#). If you are interested in applying for academic accommodations, contact the [Moses Center](#) as early as possible in the semester. If you already receive accommodations through the Moses Center, request your accommodation letters through the Moses Center Portal as soon as possible ([mosescsa@nyu.edu](mailto:mosescsa@nyu.edu) | 212-998-4980).

3. Health and Wellness - To access the University's extensive health and mental health resources, contact the [NYU Wellness Exchange](#). You can call its private hotline (212-443-9999), available 24 hours a day, seven days a week, to reach out to a professional who can help to address day-to-day challenges as well as other health-related concerns.

4. Student Support Resources - There are a range of resources at SPS and NYU to support your learning and professional growth. For a complete list of resources and services available to SPS students, visit the [NYU SPS Office of Student Affairs site](#).

5. Religious Observance - As a nonsectarian, inclusive institution, NYU policy permits members of any religious group to absent themselves from classes without penalty when required for compliance with their religious obligations. Refer to the [University Calendar Policy on Religious Holidays](#) for the complete policy.

6. Academic Integrity and Plagiarism - You are expected to be honest and ethical in all academic work. Moreover, you are expected to demonstrate how what you have learned incorporates an understanding of the research and expertise of scholars and other appropriate experts; and thus recognizing others' published work or teachings—whether that of authors, lecturers, or one's peers—is a required practice in all academic projects.

Plagiarism involves borrowing or using information from other sources without proper and full credit. You are subject to disciplinary actions for the following offenses which include but are not limited to cheating, plagiarism, forgery or unauthorized use of documents, and false form of identification

[Turnitin](#), an originality detection service in NYU Brightspace, may be used in this course to check your work for plagiarism.

Read more about academic integrity policies at the NYU School of Professional Studies on the [Academic Policies for NYU SPS Students](#) page.

7. Use of Third-Party Tools - During this class, you may be required to use non-NYU apps/platforms/software as a part of course studies, and thus, will be required to agree to the “Terms of Use” (TOU) associated with such apps/platforms/software.

These services may require you to create an account but you can use a pseudonym (which may not identify you to the public community, but which may still identify you by IP address to the company and companies with whom it shares data).

You should carefully read those terms of use regarding the impact on your privacy rights and intellectual property rights. If you have any questions regarding those terms of use or the impact on the class, you are encouraged to ask the instructor prior to the add/drop deadline.