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MBA 655.02: Advanced Financial Analysis Using Excel

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The University of Montana
School of Business Administration
Department of Accounting and Finance

Course: MBA 655-02 Advanced Financial Analysis using Excel

Professor: Bruce A. Costa, Ph.D.	Office:	GBB 318
Semester: Spring 2004	Office Phone:	243-6155
Section: 02 MW 2:10 – 3:30 thru week 5	Location:	GBB L-26
Email: bruce.costa@business.umt.edu		
Office Hrs: MW 11:00 to 12:30, other times available by appointment		

Web page: www.business.umt.edu/faculty/Costa/default.asp

Text Books:

Timothy R. Mayes and Todd M. Shank, Financial Analysis with Microsoft Excel 2002, 3rd Edition, Thompson/South-Western 2004. (Required)

Robert C. Higgins, Analysis for Financial Management, 7th Edition, McGraw Hil/Irwin 2004. (Required)

Financial Press:

Wall Street Journal, Business Week, and/or Barrons (Recommended)

Course Objective:

There are two parts to solving almost any financial management problem. The first part is the analysis of the problem. By developing comfort with spreadsheet modeling, students are able to analyze data more efficiently and effectively. Second, is the interpretation, conclusions, and recommendations that come from the analysis. By increasing proficiency in analyzing data, students will be able to spend more time developing their conclusions and recommendations.

This course stresses both areas required to solve any financial problem, the analysis and the write up. We will examine the tools and methodology required to solve various financial problems using Microsoft Excel. Each section will be presented via notes and real world examples that can be solved using MS Excel. Short write ups in memo format will stress the importance of presenting your analysis.

Exams

There is no exam associated with this course.

Memos:

There will be an assigned memo after each class due the next class meeting. Each memowill deal with the topics covered in class. These are individual assignment however you are encourage to work together to solve the problems. The memos are worth 90 percent of you final grade.

Collected Assignments:

All answers must be typed. Handwritten responses will not be accepted. Answers must be well organized and clearly articulate the thought process used to come to your conclusions. I find the memo format available in Microsoft Word is a good way to present your results. I reserve the right to reject any assignments that are disorganized or sloppy

One of the most important skills you can gain is the ability to write accurate and well-organized reports or responses. In business, sloppiness will not be tolerated. I will deduct up to 25% for disorganized and sloppy responses.

Participation:

Attending and participating in class discussion and being prepared is worth 10 percent of your course grade.

Classroom Philosophy:

My Role: My role will be to act as a facilitator. I will provide opportunity, structure and direction to facilitate your learning of fundamental concepts centered on the concepts of financial management. I will also provide you opportunities to begin developing skills and experience useful to a teamwork approach utilized in many of today's corporations.

Your Role: Your role is to engage in active learning, both individually and collectively. You will learn and apply important financial concepts while you gain experience working collaboratively with others to solve the problems. Your success in this class, as in life, will depend on both your effort and performance.

A Final Thought:

Over 2400 years ago Confucius said:

What I **hear**, I forget.

What I **see**, I remember.

What I **do**. I understand.

A wise and humble professor of mine at FSU modified Confucius' statement to be more relevant in today's classroom environment:

What I **hear**, I forget.

What I **hear and see**, I remember a little.

When I **hear, see, and ask questions about or discuss** with someone else, I begin to understand.

When I **hear, see, discuss, and do**, I acquire knowledge and skill.

When I **teach to another** I master.

Our goal is to learn. Let us all remain cognizant of how the process really works.

***The faculty and staff of the School of Business Administration at
The University of Montana-Missoula are committed to excellence
in innovative experiential learning and professional growth
through research and service.***