CERTIFICATE IN

FINANCIAL PORTFOLIO MANAGEMENT

WHY FINANCIAL PORTFOLIO MANAGEMENT?

The financial portfolio management curriculum prioritizes investment knowledge and skills with practical application and professional relevance. The students will utilize industry-standard analysis tools such as Bloomberg terminal and EDGAR database to perform fundamental analysis on companies and industries. They will learn valuation and pricing models for various financial securities such as stocks, bonds, futures, options, and currencies. They will engage in practical exercises analysis and managing a real portfolio valued at $1.6 million. In addition, the students will have opportunities to obtain professionally recognized certificates such as Investment Foundations Certificate from the CFA Institute and may have the chance to receive scholarships for the CFA level 1 exam.

STANDARD FINANCE COURSES

FIN 2303	Business Finance
FIN 3403	Financial Intermediaries and Markets
FIN 3453	Financial Modeling and Analysis
FIN 4103	Investments
FIN 4303	Advanced Corporate Finance

PORTFOLIO MANAGEMENT SPECIFIC COURSES

FIN 4603	Equity Valuation
FIN 4613	Student Investment Fund
FIN 4133	International Financial Management
FIN 4113	Derivatives Securities and Markets OR
FIN 4423	Mergers and Acquisitions
FIN 4713	Fixed Income Securities and Markets
FIN 4513	Financial Risk Management

STUDENT DEVELOPMENT OPPORTUNITIES

- Scholarship for the Investment Foundations Certificate by CFAI
- Financial Modeling online course and foundations certificate by FMI
- Scholarship to take the CFA level 1 exam
- Scholarships to take the CAIA level 1 exam
- CFA Research Challenge
- Williams Equity Research Competition

COMMUNITY OUTREACH OPPORTUNITIES

- Speaker series, networking events
- Student guest at CFA speaker series and meetings in OKC
- External industry mentors

GET CONNECTED

Michael F. Price College of Business | ***Division of Finance***
Chitru Fernando, Ph.D., *Division Director*
307 W Brooks St, Norman, OK 73019
3250 Adams Hall | finance@ou.edu | (405) 325-5591 | price.ou.edu

The UNIVERSITY of OKLAHOMA PRICE COLLEGE OF BUSINESS

CERTIFICATE IN

COMMERCIAL BANKING

WHY COMMERCIAL BANKING?

A specialization in Commercial Banking enables career-ready graduates and gives them experience with commercial and consumer lending and credit analysis. Internships are highly encouraged and available in this track. Students can earn 3 credit hours for a banking internship where they gain real-life experiences in different departments of the bank. Students will also have the opportunity to earn a certificate from RMA (Risk Management Association) after successfully passing a test from RMA and completing the RMA Credit Essentials Course, which will be taught by an OU professor. Banks help communities grow and thrive by providing loans to businesses and individuals, so working for one can be a fulfilling career. Working hours are generally 8 to 5, allowing for a good work-life balance.

STANDARD FINANCE COURSES

FIN 2303	Business Finance
FIN 3453	Financial Modeling and Analysis
FIN 4103	Investments
FIN 4303	Advanced Corporate Finance
ACCT 3113	Intermediate Acct I
ACCT 3123	Intermediate Acct II

COMMERCIAL BANKING SPECIFIC COURSES

FIN 3403	Financial Intermediaries and Markets
FIN 4413	Commercial Banking
FIN 3413	Credit Analysis Essentials

CHOOSE 1 ELECTIVE:

ACCT 4970	Financial Statement Analysis
FIN 4703	Internship in Finance

STUDENT DEVELOPMENT OPPORTUNITIES

- Bank executives in classroom as part of curriculum
- Internship for 3 hours course credit
- RMA Credit Essentials Course taught by OU professor
- RMA Credit Essentials Course Certificate
- Finance Student Association at OU

COMMUNITY OUTREACH OPPORTUNITIES

- Speaker series, networking events
- Student access to RMA meetings and conferences
- External scholarship opportunities with RMA
- Tour of Dallas Fed

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TRACK IN

CORPORATE FINANCE

WHY CORPORATE FINANCE?

A specialization in a traditional corporate finance curriculum enables career ready graduates and gives them a strong foundation that is fundamental to understanding how companies operate and financial decisions. This specialization provides in-depth exposure to key corporate finance concepts such as financial modeling; corporate financial analysis, and planning; valuation; and capital budgeting. Communication and problem solving are among some of the soft skills that are expected to be developed with the corporate finance specialization. This foundation also provides a solid underpinning for students looking to continue their education (i.e., MBA) or pursue specialized finance certifications (e.g., CFA or CMA).

STANDARD FINANCE COURSES

FIN 2303	Business Finance
FIN 3403	Financial Intermediaries and Markets
FIN 3453	Financial Modeling and Analysis
FIN 3503	Investments
FIN 3603	Advanced Corporate Finance
ACCT 3113	Intermediate Acct I
ACCT 3123	Intermediate Acct II

STUDENT DEVELOPMENT OPPORTUNITIES

- Wall Street Sooners Investment Banking Club
- Finance Student Association at OU
- Case competitions
- Financial Modeling Certificate

COMMUNITY OUTREACH OPPORTUNITIES

- Speaker series
- Networking events

CORPORATE FINANCE RELATED COURSES

FIN 4423	Mergers and Acquisitions
FIN 4443	Sustainable Finance
FIN 4453	Corporate Financial Planning & Analysis
FIN 4513	Financial Risk Management
FIN 4133	Internatl Financial Management
FIN 4970	Corporate Finance Strategy
FIN 4970	Venture Capital Finance

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TRACK IN

ENERGY FINANCE

WHY ENERGY FINANCE?

The track in Energy Finance prepares career-ready graduates for finance roles inside energy companies and related organizations. Students develop broadly applicable skills in financial modeling, FP&A, capital planning, valuation, risk management, financial statement analysis, and corporate development, then apply those skills across exploration and production, midstream, downstream, power and utilities, and emerging energy technologies. Oklahoma and the region offer deep energy-industry connections and opportunities for experiential learning.

RECOMMENDED COURSES

FIN 2403 Business Finance

FIN 34X3 Energy Financial Modeling*

FIN 43X3 Energy Corporate Finance*

FIN 4113 Derivative Securities & Markets

FIN 4443 Sustainable Finance

FIN 4513 Financial Risk Management

*Two new courses are under development. Until they are available, students should take the standard FIN 3453 and 4303, respectively.

STUDENT DEVELOPMENT OPPORTUNITIES

- Energy Finance Club at OU
- Enverus Certified Specialist training
- Professional software and energy data (Enverus and PHDwin)
- Energy-industry case studies and projects
- Company visits and professional networking
- Presentations with feedback from industry professionals

COMMUNITY OUTREACH OPPORTUNITIES

- Speaker series
- Networking events
- Industry panels
- Employer and alumni engagement

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CERTIFICATE IN

REAL ESTATE FINANCE

WHY REAL ESTATE FINANCE?

A certificate in Real Estate enables career-ready graduates and gives them experience with industry standard software like ARGUS and CoStar. The financial analysis of real estate is a valuable skill for residential and commercial brokers when negotiating deals for leasing commercial property or helping a client understand the finance of buying a house. These same financial skills are invaluable to developers looking to create new properties or holders of existing real estate portfolios who need to make the best decisions regarding holding, selling, or leasing their portfolios. A real estate certificate can also prepare students for careers in mortgage lending.

STANDARD FINANCE COURSES

FIN 2303	Business Finance
FIN 2403	Principles of Real Estate

REAL ESTATE SPECIFIC COURSES

FIN 4013	Real Estate Finance
FIN 4213	Real Estate Investments
FIN 4223	Real Estate Modeling and Analysis
FIN 4970	Real Estate Market Analysis

STUDENT DEVELOPMENT OPPORTUNITIES

- Case competitions
- Professional development training
- Company visits
- Attend professional conferences
- Real Estate Club at OU
- Finance Student Association at OU

COMMUNITY OUTREACH OPPORTUNITIES

- Annual conference
- Speaker series
- Networking events

REAL ESTATE MODELING AND ANALYSIS

The culminating experiential course integrates case studies, professional software, financial analysis and modeling, and student presentations to panels of industry professionals for feedback.

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CERTIFICATE IN

WEALTH MANAGEMENT

WHY WEALTH MANAGEMENT?

A specialization in Wealth Management enables career-ready graduates and gives them experience with retirement planning, estate planning, and insurance planning. Students are encouraged to take the SIE exam and will be fully funded to study for and take the exam. Students also have the option to study and take the CFP exam by taking 6 required courses for the CFP. Numerous networking events, site visits, and scholarships will also be available to students in this track. Wealth Managers help clients plan for their financial future and meet their financial goals, so working as one can be fulfilling. Working hours are flexible, allowing for a good work-life balance. Wealth Managers also often work in teams to serve their clients and are adept at addressing a wide range of financial matters. Many Wealth Managers are currently retiring themselves, and the massive transfer of wealth from baby boomers to their beneficiaries is creating a great career opportunity for those who choose to pursue Wealth Management.

STANDARD FINANCE COURSES

FIN 2303	Business Finance
FIN 3403	Financial Intermediaries and Markets
FIN 3453	Financial Modeling and Analysis
FIN 4103	Investments
FIN 4303	Advanced Corporate Finance
ACCT 3113	Intermediate Acct I
ACCT 3123	Intermediate Acct II
ACCT 3603	Income Tax Accounting I

WEALTH MANAGEMENT SPECIFIC COURSES

FIN 2503	Principles of Insurance
FIN 4143	Retirement Planning
FIN 4153	Estate Planning
FIN 4663	Wealth Management Strategies Capstone

STUDENT DEVELOPMENT OPPORTUNITIES

- Case competitions
- Credentialing (SIE*, FINRA Series, CFP, CFA)
- Capital Group Fellowship Scholarships
- Wealth Management Club at OU
- Finance Student Association at OU

COMMUNITY OUTREACH OPPORTUNITIES

- Speaker series
- Networking events
- Student access to FPA meetings & conferences

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