THE OHIO STATE UNIVERSITY
Fisher College of Business
Department of Finance

COURSE SYLLABUS

Business Finance 6226

FINANCE CAPSTONE PROJECT

Spring Semester (Term II) 2026

Instructor Information

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Course Description

This is an experiential learning course for students in the Specialized Masters – Finance (SMF) program. The objective of the course is to give SMF students an opportunity to practice their analytical and soft skills by working in teams on real finance project under faculty supervision.

Student teams should manage the project as if they are offer consulting services to a client. In consultation with their faculty supervisor, teams define the project's scope, nature of deliverables, and manage the project throughout the semester. Teams are expected to submit all deliverables according to faculty expectations and make a presentation **NO LATER THAN APRIL 24. Exact date and time of final presentations will be announced by faculty supervisor in each section.**

Expectations

All SMF students are expected to conduct themselves in a professional manner throughout the duration of the project. **Students will be pre-assigned to teams. These assignments, as in the fall 2025 core courses, are final and non-negotiable.** Each team has a designated leader. Team leaders are expected to act as liaisons between the team and the instructors of the workshop, Professors Pinteris and Salopek.

Team members are expected to:

- Produce a project management plan with specific milestones after having a first meeting with their faculty supervisor and present it to their instructor supervisor for approval.

- Coordinate their schedules to arrange for meetings with their faculty supervisor during their class designated times.
- Meet every two to three weeks with the course instructor supervising their project to review progress in reaching the plan's milestones.
- Provide a weekly update to their course supervisor stating their progress and next steps.
- Manage the project in such way that they reach the project's milestones.
- Resolve any problems that arise as soon as possible by reaching out to their instructor supervisor.
- Ensure that all team members accomplish their assigned tasks in a timely manner according to the project management plan's milestones.
- Address issues of any team member's lack of performance by reaching out to their faculty supervisor as soon as a pattern emerges.
- Submit all project deliverables and make a presentation to the client by APRIL 24.

Grading Procedures

Course grades will be assigned based on the following criteria:

- Quality of final deliverables according to faculty expectations as described in the project management plan.
- Quality of final presentation to the faculty supervisor (and possibly other guest judges).
- Progress with reaching milestones as outlined in the project management plan.

The above criteria will weigh heavily in the determination of the final grade. However, additional criteria will also play a crucial role in the evaluation of each team and individual team members in particular, such as:

- Professional conduct by all team members.
- Teammate evaluation of each member's performance.

All teams must strive to meet the above stated expectations. All students must place first and foremost the team's interests to ensure satisfaction with the management of the project and the quality and timely submission of the project's deliverables.

Teamwork

This is a team effort so each team member should place the team's performance above their personal motives. To ensure team success the following suggestions should be followed:

- Communicate effectively, meaning in a timely and professional manner, with each other and your instructor supervisor.
- Maintain a record (meaning e-mails) of all communications between your teammates and your instructor supervisor.
- Team leaders should be the main contact point between the team and their instructor supervisor.
- Team leaders must ensure that all team members are copied in all forms of communication.

- Team members commit to the success of the team.
- Each team plans ahead, leaving time for contingencies.
- Team members, and primarily the team leader, ensure that tasks have been allocated fairly among the team's members and that project milestones are reached. They also reach out to the instructor supervisor to ensure that difficulties with managing the project are addressed in an expedited manner.
- Team leaders as well as individual members should discuss concerns about underperformance or lack of collaboration among teammates with their instructor supervisor at the first sign that such problems cannot be adequately resolved within the team.
- Team members show up for meetings, have completed their assigned tasks according to the project management plan, and are prepared to contribute.

Failure to adhere to the above expectations could result in a lower course grade, including failing the course.

Meeting Schedule

Teams will be assigned an advisor/supervisor. Professors Salopek and Pinteris will each supervise approximately half of the teams. Teams will arrange with their supervisor to hold regular meetings, most likely every two weeks or more often. During these meetings, teams will report on their progress. Supervisors will ensure that teams are on track according to their project management plan. The schedule of meetings will most likely coincide with the timeline of milestones on the team's project management plan. Each team leader is expected to make arrangements with the team's supervisor to determine the meeting schedule and location.

Academic Integrity

From the Fisher College statement on your obligation to maintain academic integrity:

> *"As a member of the Fisher College of Business community, I am personally committed to the highest standards of ethical behavior. Honesty and integrity are the foundation from which I will measure my actions. I will hold myself accountable to adhere to these standards. As a leader in the community and business environment, I will pledge to live by these principles and celebrate those who share these beliefs."*

Students are responsible for knowing and abiding by these standards.

Disability Accommodation

To ensure that disability-related concerns are properly addressed from the beginning, students with disabilities who require reasonable accommodations to participate in this class are asked to contact the Office of Disability Services (150 Pomerene Hall, 292-3307). Please also inform me of any arrangements you are making with ODS.

Use of Artificial Intelligence (AI)

There has been a significant increase in the popularity and availability of a variety of generative artificial intelligence (AI) tools, including ChatGPT, Sudowrite and others. These tools will help shape the future of work, research and technology but when used in the wrong way, they can stand in conflict with academic integrity at Ohio State.

All students have important obligations under the Code of Student Conduct to complete all academic and scholarly activities with fairness and honesty. Specifically, students are not to use unauthorized assistance in the laboratory, on field work, in scholarship or on a course assignment unless such assistance has been authorized specifically by the course instructor. In addition, students are not to submit their work without acknowledging any word-for-word use and/or paraphrasing of writing, ideas or other work that is not your own. These requirements apply to all students undergraduate, graduate, and professional.

To maintain a culture of integrity and respect, these generative AI tools should not be used in the completion of course assignments unless an instructor for a given course specifically authorizes their use. Some instructors may approve of using generative AI tools in the academic setting for specific goals. However, these tools should be used only with the explicit and clear permission of each individual instructor, and then only in the ways allowed by the instructor.

COVID Policy

The university strives to maintain a healthy and accessible environment to support student learning in and out of the classroom. If you anticipate or experience academic barriers based on your disability (including mental health, chronic, or temporary medical conditions), please let me know immediately so that we can privately discuss options. To establish reasonable accommodations, I may request that you register with Student Life Disability Services. After registration, make arrangements with me as soon as possible to discuss your accommodations so that they may be implemented in a timely fashion.

If you are isolating while waiting for a COVID-19 test result, please let me know immediately. Those testing positive for COVID-19 should refer to the Safe and Healthy Buckeyes site for resources. Beyond five days of the required COVID-19 isolation period, I may rely on Student Life Disability Services to establish further reasonable accommodations. You can connect with them at slds@osu.edu; 614-292-3307; or slds.osu.edu.

Suggestions for Effective Team Performance

The following suggestions (taken from Robert Bruner's cases textbook) are necessary, but not sufficient, conditions for effective team performance. A major factor in a team's success is each member's effort and dedication to the success of the team. It is crucial that you develop a good working relationship with your teammates. Each member should hold every other member accountable for his or her contribution to the team's performance.

- ✓ Members commit to the success of the team.
- ✓ The team plans ahead, leaving time for contingencies.
- ✓ The team meets regularly.
- ✓ Members show up for meetings and are ***prepared*** to contribute.
- ✓ There may or may not be a formal leader, but role assignments within the team are clear. Team members meet their assigned obligations.