

BUSFIN 4630H: Honors Finance Senior Capstone Class Seminar, Fall 2025

August 2025 – Subject to Updates and Changes

Instructor: Chad Zipfel (zipfel.4@osu.edu) <https://www.linkedin.com/in/chad-zipfel-ba5759103/>

We will meet in person Tuesday and Thursday from 12:45pm to 2:05pm in SB 315.

Course Overview

The course is a culmination of finance training throughout the program. It will leverage real-world examples across industries to teach advanced topics on financial management within small and large firms. Industry experts and outside sources will be leveraged throughout the semester to reinforce material. The course is highly interactive as students will need to come prepared each class to discuss and apply the material. Course will leverage case studies, simulations, written reflections, and role play exercises. ***You should have high expectations of me to deliver new and practical training.*** Essentially, I want you to walk away with a toolkit that you can apply in a variety of scenarios upon graduation. ***Conversely, my expectations for you will be high. This is a 3 credit hour course and you will get out of it what you put into it.*** The pacing of activity may feel intense at times, so prepare yourselves and plan ahead (see course schedule on last page). This will not be as “easy” as Junior seminar. This is a full 3 credit hour capstone course. Time management and maintaining focus will be key enabler to your success in this course. This is meant to be an extension from your internship that propels you into a fast-start at your first full-time job, and then later career.

The course is divided into three broad themes:

1. First part of class will highlight specific experiences/skills you can leverage early in your career at a variety of large MNC companies, working with other functions (e.g. Marketing, Sales, Operations).
2. We transition to more senior decision making and macro decisions that Finance helps influence.
3. And finally, we end the course with more of an external viewpoint: hearing from a variety of Finance leaders and each other via team presentations so you have a better grasp on the evolving world of Finance.

Course Material

Material will be posted on Carmen and discussed in class. This will come in the form of instructor’s own material along with supplemental articles or assignments. There is no required text book.

The course will require the purchase of a case/simulation/exercise packet from Harvard Business Review website (\$37.40). Follow this link and it will walk you through the steps to set up an account to purchase the packet (use name.#@osu.edu email): <https://hbsp.harvard.edu/import/1326341>

I am awaiting pricing details on another comprehensive global business simulation (~\$20 expected).

Wall Street Journal: Access monthly WSJ subscription for \$24 a year. Here is referral link to access this price: <https://r.wsj.com/PROFwjqu>

Grading (see course schedule at end of syllabus for details and timing)

Students should notify instructor one week in advance if they will be unable to attend class. Unless there is a documented medical emergency, there are no exceptions for assignments submitted late. Time management is needed in this course (and your career); students can plan accordingly using Carmen due dates and the course schedule at end of syllabus.

Point totals listed below are the cut-offs for letter grades. No rounding.

- **Participation (~15%)**

Participation in case discussions and asking questions during class will be monitored. Your engagement level with the course material inside and outside class will influence your grade at the end of semester. Your teammates will weigh in on your contributions as well

- **Reflections/Homework/Assessments (~35%)**

Throughout the semester, there will be multiple chances to read material before class and respond to questions. This will then form basis of discussion in class that week. For graded assignments, scoring rubrics will be published ahead.

- **Case Studies/Simulations (~40%)**

For case discussions/simulations, you will be given preparation questions to help guide your analysis. At a minimum, you should address the study questions prior to class, but I encourage you to think about relevant issues beyond the questions in the guidelines. The case grade reflects both your preparation of the case materials and your participation in the case discussion. You will submit your case brief to Carmen by the published due date.

It is important for the group to communicate regularly and share with me if the other individuals are not doing their perceived fair share. Only one upload submission per group is required in Carmen. At the end of the semester, you will be required to complete a simple peer feedback assessment (shared only with me). You will grade your groupmates as “above”, “meeting”, or “below” expectations for the groupwork this semester.

- **Final Presentation (~10%)**

Working in your group, identify and present on a relevant current event financial topic that was NOT covered in class this semester. This involves finding an article in the WSJ, Bloomberg News, consulting publications, or other financial literature about topics NOT discussed this semester that you feel would benefit your peers.

Presentation should be no more than 10 minutes in length, and then allow for 5 minutes of Q&A from the class. The goal is to connect the class to relevant events based on what we learned this semester. Teach us something new and/or reinforce class learning with tangible examples.

Groups should succinctly summarize the topic; offer their analysis of the issue, problem, or opportunity; and provide their point of view or recommendation. Groups will submit presentation ahead of class as select number of students will be assigned to review and come prepared with questions after the group presents.

Grade	Points	%
A	214.0	93.0%
A-	207.0	90.0%
B+	200.0	87.0%
B	191.0	83.0%
B-	184.0	80.0%
C+	177.0	77.0%
C	168.0	73.0%
C-	161.0	70.0%
	230	total

Assignment	Points	
Summer Reflection	10	Individual
Global Auto Sim	35	Group
Balanced Scorecard	25	Group
Cameco Case	10	Group
Pinewood Case and Roleplay	35	Group
2 Current Event Group Q&A (AI and IR)	15	Group
Financial Analysis Detective Simulation	35	Individual
Semester Participation	30	Individual
Team "Teach Us" Presentation	25	Group
Class/Guest Speaker Reflection	10	Individual
	230	

Course Policies

- **Professionalism**

Professionalism includes arriving on time and prepared, asking thoughtful questions, answering questions, and contributing to a positive classroom environment. Treat class like you are in a working session meeting once you start your career. Leverage guest speakers' experience and classmates network to apply what you are learning; further adding to your career toolkit.

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.

Net: Assignments will be turned in online and I will be using Turnitin and other applications that have AI detection algorithms. You need to complete the assignments using your own brain and your own thinking...which will lead to more of your own learning and the ability to be a great intern/new hire!

Academic integrity:

All students enrolled in this course are responsible for abiding by the guidelines outlined in the University's Code of Student Conduct. According to University Rule 3335-31-02, all suspected cases of academic misconduct will be reported to the Committee on Academic Misconduct.

Academic integrity is essential to maintaining an environment that fosters excellence in teaching, research, and other educational and scholarly activities. Thus, The Ohio State University and the Committee on Academic Misconduct (COAM) expect that all students have read and understand the University's [Code of Student Conduct](#), and that all students will complete all academic and scholarly assignments with fairness and honesty. Students must recognize that failure to follow the rules and guidelines established in the University's Code of Student Conduct and this syllabus may constitute Academic Misconduct.

The Ohio State University's Code of Student Conduct (Section 3335-23-04) defines academic misconduct as: Any activity that tends to compromise the academic integrity of the University or subvert the educational process. Examples of academic misconduct include (but are not limited to) plagiarism, collusion (unauthorized collaboration), copying the work of another student, and possession of unauthorized materials during an

examination. Ignorance of the University's Code of Student Conduct is never considered an excuse for academic misconduct, so I recommend that you review the Code of Student Conduct and, specifically, the sections dealing with academic misconduct.

If I suspect that a student has committed academic misconduct in this course, I am obligated by University Rules to report my suspicions to the Committee on Academic Misconduct. If COAM determines that you have violated the University's Code of Student Conduct (i.e., committed academic misconduct), the sanctions for the misconduct could include a failing grade in this course and suspension or dismissal from the University.

If you have any questions about the above policy or what constitutes academic misconduct in this course, please contact me. You can also review these resources:

[Committee on Academic Misconduct](https://go.osu.edu/coam) (go.osu.edu/coam)

[Ten Suggestions for Preserving Academic Integrity](https://go.osu.edu/ten-suggestions) (go.osu.edu/ten-suggestions)

[Eight Cardinal Rules of Academic Integrity](https://go.osu.edu/cardinal-rules) (go.osu.edu/cardinal-rules)

Course-specific Copyright Policy:

Material provided by the instructor may not be re-posted anywhere without the explicit permission of instructors. See University Copyright Policy.

Religious accommodations:

Ohio State has had a longstanding practice of making reasonable academic accommodations for students' religious beliefs and practices in accordance with applicable law. In 2023, Ohio State updated its practice to align with new state legislation. Under this new provision, students must be in early communication with their instructors regarding any known accommodation requests for religious beliefs and practices, providing notice of specific dates for which they request alternative accommodations within 14 days after the first instructional day of the course. Instructors in turn shall not question the sincerity of a student's religious or spiritual belief system in reviewing such requests and shall keep requests for accommodations confidential.

With sufficient notice, instructors will provide students with reasonable alternative accommodations with regard to examinations and other academic requirements with respect to students' sincerely held religious beliefs and practices by allowing up to three absences each semester for the student to attend or participate in religious activities. Examples of religious accommodations can include, but are not limited to, rescheduling an exam, altering the time of a student's presentation, allowing make-up assignments to substitute for missed class work, or flexibility in due dates or research responsibilities. If concerns arise about a requested accommodation, instructors are to consult their tenure initiating unit head for assistance.

A student's request for time off shall be provided if the student's sincerely held religious belief or practice severely affects the student's ability to take an exam or meet an academic requirement **and** the student has notified their instructor, in writing during the first 14 days after the course begins, of the date of each absence. Although students are required to provide notice within the first 14 days after a course begins, instructors are strongly encouraged to work with the student to provide a reasonable accommodation if a request is made outside the notice period. A student may not be penalized for an absence approved under this policy.

If students have questions or disputes related to academic accommodations, they should contact their course instructor, and then their department or college office. For questions or to report discrimination or harassment based on religion, individuals should contact the [Civil Rights Compliance Office](#).

Policy: [Religious Holidays, Holy Days and Observances](#)

Students with Disabilities:

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 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. You can connect with them at slds@osu.edu; 614-292-3307; or slds.osu.edu. or in person at 98 Baker Hall, 113 W. 12th Ave.

Mental Health Services:

As a student you may experience a range of issues that can cause barriers to learning, such as strained relationships, increased anxiety, alcohol/drug problems, feeling down, difficulty concentrating and/or lack of motivation. These mental health concerns or stressful events may lead to diminished academic performance or reduce a student's ability to participate in daily activities. The Ohio State University's Student Life Counseling and Consultation Service (CCS) is here to support you. If you find yourself feeling isolated, anxious or overwhelmed, [on-demand mental health resources](http://go.osu.edu/ccsondemand) (go.osu.edu/ccsondemand) are available. You can reach an on-call counselor when CCS is closed at [614- 292-5766](tel:614-292-5766). 24-hour emergency help is available through the [National Suicide Prevention Lifeline website](http://suicidepreventionlifeline.org) (suicidepreventionlifeline.org) or by calling [1-800-273-8255\(TALK\)](tel:1-800-273-8255). [The Ohio State Wellness app](http://go.osu.edu/wellnessapp) (go.osu.edu/wellnessapp) is also a great resource.

Creating an Environment Free from Harassment, Discrimination, and Sexual Misconduct:

The Ohio State University is committed to building and maintaining a community to reflect diversity and to improve opportunities for all. All Buckeyes have the right to be free from harassment, discrimination, and sexual misconduct. Ohio State does not discriminate on the basis of age, ancestry, color, disability, ethnicity, gender, gender identity or expression, genetic information, HIV/AIDS status, military status, national origin, pregnancy (childbirth, false pregnancy, termination of pregnancy, or recovery therefrom), race, religion, sex, sexual orientation, or protected veteran status, or any other bases under the law, in its activities, academic programs, admission, and employment. Members of the university community also have the right to be free from all forms of sexual misconduct: sexual harassment, sexual assault, relationship violence, stalking, and sexual exploitation.

To report harassment, discrimination, sexual misconduct, or retaliation and/or seek confidential and non-confidential resources and supportive measures, contact the Civil Rights Compliance Office:

Online reporting <http://civilrights.osu.edu/> Call 614-247-5838 or TTY 614-688-8605, Email equity@osu.edu

The university is committed to stopping sexual misconduct, preventing its recurrence, eliminating any hostile environment, and remedying its discriminatory effects. All university employees have reporting responsibilities to the Civil Rights Compliance Office to ensure the university can take appropriate action:

- All university employees, except those exempted by legal privilege of confidentiality or expressly identified as a confidential reporter, have an obligation to report incidents of sexual assault immediately.
- The following employees have an obligation to report all other forms of sexual misconduct as soon as practicable but at most within five workdays of becoming aware of such information: 1. Any human resource professional (HRP); 2. Anyone who supervises faculty, staff, students, or volunteers; 3. Chair/director; and 4. Faculty member.

Tentative Course Schedule (on next page)

The course syllabus is a general plan for the course; deviations announced to the class may be necessary.

Red font reflects graded assignments

	Monday	Tuesday	Wednesday	Thursday
Section 1: redefining the role Finance can play at a Company	25-Aug	26-Aug	27-Aug	28-Aug
		Course Outline/Expectations (for input); Form 6 Working Teams		Summer Reflection Due Career Discussion: what is most pressing?
	1-Sep	2-Sep	3-Sep	4-Sep
	pre-read	Future of Finance Discussion Current Event: Career with AI		FP&A Module
	8-Sep	9-Sep	10-Sep	11-Sep
		Corporate Tax Structure and Transfer Pricing	pre-read Cameco Case	Team working session on Cameco Case
	15-Sep	16-Sep	17-Sep	18-Sep
	Cameco Recap KPI Pre-Read	Using Leading KPIs and Scorecards to Drive Action		Team working session on KPI Sim
	22-Sep	23-Sep	24-Sep	25-Sep
Section 2: Senior decision making and macro decisions that Finance helps influence.	pre-read Auto Sim	Global Auto Simulation: Kick-Off and Start		Global Auto Simulation
	29-Sep	30-Sep	1-Oct	2-Oct
	KPI Sim Recap Due	Global Auto Simulation		Global Auto Simulation: Finish
	6-Oct	7-Oct	8-Oct	9-Oct
	Auto Sim Recap Due	Final Presentation Topics Due Corp Governance, Bankruptcy, Restructuring		Divestiture Lecture
	13-Oct	14-Oct	15-Oct	16-Oct
	pre-read	Current Event (Earnings Season as IR)		Fall Break - No Class
	20-Oct	21-Oct	22-Oct	23-Oct
		Team working session on Pinewood		Pinewood role-play negotiations (part 1)
Section 3: External Viewpoints on the evolving world of Finance	27-Oct	28-Oct	29-Oct	30-Oct
		Pinewood role-play negotiations (part 2)		Lecture: Strategic Revenue Management
	3-Nov	4-Nov	5-Nov	6-Nov
	Pinewood recap due	Intro Financial Analysis Detective Group Share Lessons Learned from Junior Yr		Sim Working Session (Individual): treat like a graded exam
	10-Nov	11-Nov	12-Nov	13-Nov
		Veteran's Day Observed - No Class		Guest Speaker: CFO Perspective Jamie Schroeder Big Lots
	17-Nov	18-Nov	19-Nov	20-Nov
		Career: Handling cross-road decisions		Life: managing big purchases, household budget while still planning for retirement
	24-Nov	25-Nov	26-Nov	27-Nov
Section 3: External Viewpoints on the evolving world of Finance		Career Transition: YP View	Thanksgiving Break - No Class	
	1-Dec	2-Dec	3-Dec	4-Dec
		Career Transition: Chad's view along with Exec. Recruiter	Presentations Due 11:59pm	Final Team Presentations (6 x 10 min each + Q&A)
	8-Dec	9-Dec	10-Dec	11-Dec
		Class Reflection Share Out Ask any question you want :-)		Reading Day - No Class