

BUSFIN 3890H: Honors Finance Junior Seminar Class Seminar, Spring 2024

January 2024 – Subject to Updates and Changes

Instructor: Chad Zipfel (.4@osu.edu)

<https://www.linkedin.com/in/chad-zipfel-ba5759103/>

We will meet in-person Wednesday from 2:20pm to 3:40pm in GE 285.

Course Overview

The course is designed to further your financial acumen, expand your broader business toolbox by building soft/hard skills, and prepare you for a successful internship experience. Please read through entire syllabus and review week by week details in course schedule at end of this document.

The course is highly interactive as students will need to come prepared each class to discuss and apply the material. Course will leverage industry professionals, simulations, written reflections, presentations, and in-class debates on current financial events. ***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 during your internship and life. ***Conversely, my expectations for you will be high.*** The level of activity may feel intense at times, so pace yourselves and plan ahead. This will not be an “easy A”, but everyone will have the ability to score high marks if they put in the effort. Like many courses of this nature, you will get out of it the more you put into it. Time management and maintaining focus will be key enabler to your success in this course.

And lastly, let's put in the effort, but then enjoy the time we spend together. Bring passion for the topics we are learning, and that positive energy will be contagious in the class-room.

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 simulation from Harvard Business Publishing (\$11.25). Follow this link to purchase (use OSU email): <https://hbsp.harvard.edu/import/1128011>

Wall Street Journal: Access monthly WSJ subscription for \$4 a month (cancel anytime). 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 to the right are the cut-offs for letter grades. There is no rounding or extra credit; the point totals for grade cutoffs are clear.*

- **Participation**

Participation in discussions and asking questions during class will be monitored (score of 1, 2, or 3 each week). You don't have to be an extrovert to score high with participation. You can email me questions or discussion topics, or engage in other matters. Please do be prepared for me to “cold call” on you. I don't expect you always to have the right answers, but I expect you to be able to think and ask questions. This is simulating the business

environment. Your engagement level with the course material inside and outside class will influence your grade at the end of semester.

- **Reflections/Homework Exercises**

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, including specific days when we spend first part of class debating current events impacting the world of finance. For assignments, scoring rubrics will be published ahead.

- **Simulation**

You will complete a “Financial Analysis Detective” Simulation in-class. Your grade will be reflective of how well you do identifying companies only looking at their financials, along with your rationale and confidence in each choices. A write-up will be required upon completion of the simulation.

- **Mentor and Intern Role-Play Day**

As we move into Spring Semester, Prof Pirim will be assigning mentors to Juniors in the Honors Finance program. During the class, 10 randomly chosen students will provide a 3 minute recap of what they learned from their mentor and advice to share with others. For the rest of students, I will put you in a character role-playing session where we walk through certain situations you will likely face this summer during your internship. I will be giving feedback “live” on the fly and could even come across as a “mean boss”. Please know this always comes from a place of building you up and not tearing you down. Giving and receiving feedback is a skill we want to practice in this class as you will need it moving into a working environment.

Semester Participation (1, 2, 3 each week)	45	Indy
Intro Assignment	10	Indy
Forage Internship Exploration	10	Indy
Simulation Results/Debrief	40	Team
Meet the Seniors: 3 Action Steps	5	Indy
3 Guest Speakers Reflection	15	Indy
Personal Finance Q&A	5	Indy
Practice Case and Biz Writing 1 page memo	25	Team
Group Presentation	30	Team
Mentor Reflection and Course Feedback	10	Indy

Total 195

Grade	Points
A	181
A-	175
B+	169
B	162
B-	156

Course Policies

- **Professionalism**

Professionalism includes arriving on time and prepared, asking thoughtful questions, answering questions, and contributing to a positive classroom environment. Using the Zoom interface (if needed) will be a similar experience to what you will face in Company meetings upon graduation and may be required if classes move remote. If so, you are expected to have your camera turned on. Otherwise, you are to be in-class if feeling healthy. We will have numerous guest speakers this semester. Leverage their experience and network to apply what you are learning and add to your career toolkit.

- **Course website**

We will maintain a website through Carmen. The URL is <https://carmen.osu.edu>. We will use the website to post course slides, recorded lectures, case preparation questions, take exams, etc. It is important that you check it regularly and have notifications “turned on” for when announcements are made and/or the course is modified.

- **Grade Change Policy**

Grade appeals must be emailed **within one week** after the graded work is made available. The entire document will be checked for grading errors, and correcting these could either **raise** or **lower** the overall score.

- **Academic Integrity Policy**

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 we recommend that you review the Code of Student Conduct and, specifically, the sections dealing with academic misconduct.

If we suspect that a student has committed academic misconduct in this course, we are obligated by university rules to report 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 us.

Other sources of information on academic misconduct (integrity) to which you can refer include:

- The Committee on Academic Misconduct web pages (COAM Home)
- Ten Suggestions for Preserving Academic Integrity (Ten Suggestions)
- Eight Cardinal Rules of Academic Integrity (www.northwestern.edu/uacc/8cards.htm)

- **Office of Disability Services (ODS)**

Any student who feels s/he may need an accommodation based on the impact of a disability should contact me privately to discuss his/her specific needs. Please contact the Office for Disability Services at 614-292-3307 in room 150 Pomerene Hall to coordinate reasonable accommodations for students with documented disabilities.

- **Time Expectations**

The University and College expectation is that students spend two hours outside of class for every hour spent in class. Since this is a 1.5 credit hour course, you should expect to spend around 3-5 hours per week on course-related work.

Disability Services:

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.

Tentative Course Schedule

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

Date	Week	Topic	In-Class Details	Assignment	
10-Jan-24	1	Intro to Class, Outline Semester	Intro to Class, Set Up, Expectations, hand-out Comfor Crisis	Due 1/10: 3 things learned, 3 things you want to learn, career/network focus	
17-Jan-24	2	Meet your mentor (industry pods) and Career Exploration (via TheForage)	Optimizing Mentor relationship, networking boost, intro to Forage	Due 1/22: Complete Forage Virtual Experience and Reflection	Current Event Discussion
24-Jan-24	3	Financial Analysis Detective Simulation	Will compete against each other in class (in teams), prep ahead of time!	Due 1/29: Simulation Debrief	
31-Jan-24	4	Meet the Seniors (industry pods)	Lunch: reflect on Forage exercise, what to do as they plan for internship, classes, etc	Due 2/5: 3 Action Steps coming out of Senior meeting	Current Event Discussion
7-Feb-24	5	What is it really like to issue debt? Commercial Banking 101	Guest Speaker linked to 4211: https://www.linkedin.com/in/josephsofia/		
14-Feb-24	6	Day in the life of a CFO. Corp Fin track	Guest Speaker linked to 4211: Dave Chambers		
21-Feb-24	7	What is it really like to issue equity and execute A&D?	Guest Speaker linked to 4211: https://www.linkedin.com/in/dave-leneveu/	Due 2/26: Guest Speaker Reflections	
28-Feb-24	8	Practice Case (in teams)	Work through case together: seeking data, problem solving, building model		
6-Mar-24	9	Personal Finance 101	Come with a question or tip ahead of time.	Due 3/4: Personal Finance Question or Tip	Current Event Discussion
13-Mar-24	10	Spring Break			
20-Mar-24	11	Biz Writing 101	Writing Examples in Groups (how to improve it) along with One-Page memo of prior case	Due 3/25: one page memo from practice case	
27-Mar-24	12	MS Office 101	How to leverage Excel, PPT, Word, Outlook		Current Event Discussion
3-Apr-24	14	Senior Panel: Internship Do and Don't	Healthy Snacks/Drinks provided: come with questions for Seniors		
10-Apr-24	13	Life Hacks 101	Groups Present on Comfort Crisis	Due 4/8: Comfort Crisis Presentation	
17-Apr-24	15	Mentor share-out and Intern Role Play	Random draw of 10 students to share out mentor experience and then rest of students to role play	Due 4/15: Mentor Reflection	