I. IDENTIFYING INFORMATION

Course: MSA 602  
Course Title: Financial Analysis, Planning and Control  
EPN: 22323337  
Term: Summer II  
Location: Clinton Township Center  
Course Dates: 6/13, 6/20, 6/27, 7/11, 7/18, 7/25, 8/1, 8/8/2017  
Course Days and Times: Tue 5:30PM-10:00PM;  
Prerequisites: Accounting Competency (as outlined in the Bulletin program requirements)

Blackboard:
Blackboard is a web-based learning management system licensed by CMU. Within Blackboard, a course website, also known as a shell, is automatically created for every CMU course. Face-to-face courses may or may not incorporate Blackboard, whereas Blackboard course shells are always used for online courses and will be available to you prior to the course start date. Seeing the course shell listed in Blackboard with unavailable adjacent to its title is an indication that your instructor has not made it available and is in no way indicative of registration status. To access Blackboard, open a web browser and enter https://blackboard.cmich.edu/webapps/login/. After the site loads, enter your CMU Global ID and password in the respective spaces provided. Click the "login" button to enter Blackboard and then the link to the appropriate course to enter the course's Blackboard shell. If you need assistance, contact the IT Helpdesk at 989-774-3662 / 800-950-1144 x. 3662. Self-guided student tutorial resources are also available at https://blackboard.cmich.edu/webapps/login/.

Instructor: Mark Brackon  
Primary Phone Number: 586-567-0766  
Secondary Phone Number: N/A  
E-Mail Address: brack1mg@cmich.edu  
Availability: Monday & Wednesday--All Day  

Academic Biography:
Mark Brackon is a Certified Management Accountant(CMA). He has been teaching Accounting and Finance courses at CMU and other universities for over twenty-five years.

He has worked for thirty-seven years at Chrysler Corporation with responsibilities for financial budgets and projects. His expertise is in development and implementing financial programs with budgets in excess of $1 billion.

I have been appointed a Public Arbitrator for FINRA, a division of SEC.

Academic Accomplishments:
University of Michigan Business School- BBA in Accounting  
University of Detroit-MBA in Organizational Behavior  
Walsh College-MS in Taxation

II. TEXTBOOKS AND INSTRUCTIONAL MATERIALS

Order books from MBS at http://bookstore.mbsdirect.net/cmu.htm

Textbooks and Course Materials:
Title: Foundations of Finance: Custom Edition - Bundle (E-book Available)  
Author: Keown  
Edition: 2017  
Publisher: Pearson  
Required: Yes

Title: The McGraw-Hill 36-Hour Accounting Course
Course Reserves:
N/A

Required Materials:
MyFinanceLab is required with this course. Students will receive access code with their text book.

Recommended Materials:
Calculators.

III. COURSE DESCRIPTION
Study of financial analysis, planning and control principles/methods emphasizing mechanisms used to determine the overall financial health of private, public and non-profit organizations.

IV. COURSE GOALS AND OBJECTIVES

Upon successfully completing this course, the student will be able to:

1. Appraise an organization’s financial health by evaluating data derived from management and managerial accounting practices and functions.
2. Compare the similarities and differences between the financial objectives of private, public,
3. Assess, interpret, and understand financial statements and information to determine an organization’s financial position and health.
4. Apply and evaluate analytical models used to evaluate financial performance.
5. Investigate the roles that budgeting play in financial decision-making for long-term and short-term financial planning
6. Examine various sources of capital and how funds are raised by organizations.
7. Recommend and apply strategies and principles of financial management to the allocation of funds to secure the long-term profitability and/or goal attainment of organizations.
8. Incorporate the use of finance and accounting tools and principles into organizational analysis.

V. METHODOLOGY
Lectures, discussions, group work (including small and large group projects and activities), a research paper, problems, case studies, presentations and examinations.

VI. COURSE OUTLINE/ASSIGNMENTS

Pre-Class Assignment:

Student should read chapter 1-2 in advance of weekend to prepare for class discussions.

Course Outline:

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Chapters</th>
<th>Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/13</td>
<td>An Introduction to the Foundations of Financial Management &amp; Financial Markets</td>
<td>Chapters 1 &amp; 2</td>
<td>Case #1</td>
</tr>
<tr>
<td>6/20</td>
<td>Understanding Financial Statements &amp; Evaluating Financial Performance</td>
<td>Chapters 3 &amp; 4</td>
<td>Problem 3-6</td>
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<tr>
<td></td>
<td>Research Topic Due</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6/27</td>
<td>Time Value of Money and Bonds</td>
<td>Chapters 5 &amp; 7</td>
<td>Problem 5-20&amp; 21</td>
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</table>
7/11  **Mid-Term Examination**  Chapters 1-5  Case #2

7/18  Characteristics of Stocks & Capital Budgeting Techniques  Chapters 8 & 10  C7-Mini Case  Case #3

7/25  Financing Mix and Dividend Policy  Chapters 12 & 13  Problem 13-mini case  Problem 14-14

8/1  Internal Financing & Present Values  Chapter 14  Case #4

**Research Paper Due**

8/8  **Final Examination**  Chapters 7-8, 10, 12-14

**Assignment Due Dates:**

Problems and cases are due each week following the related lecture. The homework is collected at the beginning of the class. Students are required to make copies of homework for review in class.

Case studies will be provided by the instructor.

A research paper topic, that is selected by the student, and approved by the instructor, will be part of the course requirement.

Students should select a topic of interest that covers a managerial accounting or finance subject. The term paper should be between 6-8 pages in length (not including abstract, cover sheet or reference page), and be in compliance with APA format. The paper is due on 8/1/2017.

Grading will be in compliance with rubric for research paper provided by instructor.

Late assignments: On rare occasions a student's professional responsibilities dictate and must come before classwork. If this happens in your case, you must first clear with me before assuming it is acceptable to turn in an assignment late. In any case you will be held responsible for all course content, whenever you must be away from class.

**Post-Class Assignment:**

Complete course evaluation that is online.

**Student Involvement Hours:**

Homework and case studies will require three or more hours per week in out-of-the-class time.

Student will be required to complete some homework problems in "MyFinanceLab".

**VII. CRITERIA FOR EVALUATION**

**Evaluation Criteria:**

<table>
<thead>
<tr>
<th>Component</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discussion Board</td>
<td>100</td>
</tr>
<tr>
<td>Cases</td>
<td>100</td>
</tr>
<tr>
<td>Homework</td>
<td>150</td>
</tr>
</tbody>
</table>
Term Paper                          250
Mid-Term Exam                    200
Final Exam                            200
Total                                     1000  Points

**Grading Scale:**

The following percentages will be used in this course:

A  = 94-100
A- = 90-93
B+ = 87-89
B = 84-86
B- = 80-83
C+ = 77-79
C = 74-76
E =73 and below

**Late Assignments:**

Late assignments will not be accepted.

**Make-ups and Rewrites:**

Make-ups must be on an emergency basis only.

**VIII. EXPECTATIONS**

**Attendance and Participation:**

Attendance is required. Many assignments and activities will be done in class. Students are expected to attend, be on time, be fully prepared and participate in all activities. Any absence may affect a student's grade. No distinction will be made between "excused" and "unexcused" absences.

There will be Discussion Board requirements to be posted in BlackBoard.

Group participation will also be evaluated.

**Academic Integrity:**

Because academic integrity is a cornerstone of the University's commitment to the principles of free inquiry, students are responsible for learning and upholding professional standards of research, writing, assessment, and ethics in their areas of study. Written or other work which students submit must be the product of their own efforts and must be consistent with appropriate standards of professional ethics. Academic dishonesty, which includes cheating, plagiarism and other forms of dishonest or unethical behavior, is prohibited. A breakdown of behaviors that constitute academic dishonesty is presented in the CMU Bulletin ([https://bulletins.cmich.edu/](https://bulletins.cmich.edu/)).

**Student Rights and Responsibilities:**

Each member of the Central Michigan University community assumes an obligation regarding self conduct to act in a manner consistent with a respect for the rights of others and with the University's function as an educational institution. As guides for individual and group actions within this community, the University affirms the general principles of conduct described in the Code of Student Rights, Responsibilities and Disciplinary Procedures at [https://www.cmich.edu/ess/studentaffairs/Pages/Code-of-Student-Rights.aspx](https://www.cmich.edu/ess/studentaffairs/Pages/Code-of-Student-Rights.aspx).

**IX. SUPPORT SERVICES AND OTHER REQUIREMENTS**
Library Research and Instruction Services

As a CMU student you have full access to the services and resources of the CMU Library. Reference librarians will help you find information on your research topic and answer other questions related to the library. The library's Documents on Demand office will obtain copies of the books and journal articles for you. Check out the library's website at https://library.cmich.edu for more information.

Reference librarian contact information:
1. By email: libref@cmich.edu
2. By online form: http://libguides.cmich.edu/askalibrarianform
3. By phone: (989) 774-3470.

Documents on Demand office contact information:
1. By email: docreq@cmich.edu
2. By online form: https://illiad.cmich.edu/
3. By phone: (989) 774-3022.

Writing Center

The CMU Writing Center is a free online service for all CMU students, providing help with grammar, citations, bibliographies, drafts, and editing of academic papers. Suggestions and feedback are typically provided within two business days. For additional information and to submit work, visit https://www.cmich.edu/global/writingcenter/Pages/default.aspx

Mathematics Assistance Center

The CMU Mathematics Assistance Center provides free tutoring in mathematics and statistics to students enrolled in select courses. Tutoring is available online and via telephone. To see what courses qualify and to register with the Math Assistance Center, visit http://global.cmich.edu/mathcenter/tutoring-request.aspx.

ADA

CMU provides individuals with disabilities reasonable accommodations to participate in educational programs, activities and services. Students with disabilities requiring accommodations to participate in class activities or meet course requirements should contact Student Disability Services at (800) 950-1144, extension 3018 or email sds@cmich.edu, at least 4 weeks prior to registering for class. Students may find additional ADA information and forms at https://www.cmich.edu/ess/studentaffairs/SDS/Pages/default.aspx

Note to faculty: CMU Administration will notify you if applicable; otherwise, the student will provide a "Notification Letter to the Instructor" outlining the accommodations the student is approved to receive.

X. BIBLIOGRAPHY


Center Information

CMU Clinton Township Center
@ Macomb Community College University Center (UC)
44575 Garfield Road
UC Building 1, Room 202
Clinton Township, MI 48038-1139
(586) 228-3160

MCC Campus Map: http://www.macomb.edu/resources/maps-directions/attachments/Center-Campus.pdf