

Simon Fraser University  
Maggie Benston Centre 1100  
8888 University Drive  
Burnaby, BC V5A 1S6

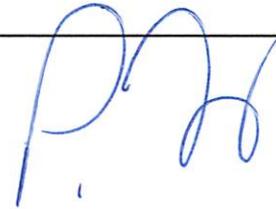
TEL 778.782.3042  
FAX 778.782.3080

gradstudies@sfu.ca  
www.sfu.ca/grad

**MEMORANDUM**

**ATTENTION** Senate  
**FROM** Peter Liljedahl, Acting Dean of  
Graduate Studies  
**RE:** Beedie School of Business

**DATE** June 15 2015  
**No.** GS2015.26

**For the information of Senate:**

Acting under delegated authority at its meeting of June 8, 2015, SGSC approved the following curriculum revisions effective **Spring 2016**:

Beedie School of Business

Program change: MSc in Finance

Course change (description): BUS 880



**BEEDIE SCHOOL OF BUSINESS**

**Memo**

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**To: Peter Liljedahl, Associate Dean, Academics**

**From: Ian McCarthy, Associate Dean, Segal Graduate School**

**Date: May 8, 2015**

**Re: Program and Course changes**

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The following program change and course changes have been approved by the Beedie School of Business, Graduate Programs Committee, and are forwarded to the Senate Graduate Studies Committee for approval. These curriculum items should be effective for Spring 2016. Please include these revisions on the next SGSC agenda.

1. *Program change: MSc in Finance*
2. *Course description change: BUS 880*

If you have any further questions or concerns, please do not hesitate to contact me.

Sincerely,

A handwritten signature in black ink, appearing to read "Ian McCarthy", is written over the typed name and title.

Dr. Ian McCarthy  
Associate Dean, Segal Graduate School  
Beedie School of Business  
Simon Fraser University  
778-782-5298

## Calendar Entry Change for MSc in Finance

<p>Summary of change: Changing the note associated with the course BUS 880 (Student Investment Advisory Service Internship).</p>
<p>Rationale for change: Typically students are not enrolled in the course at the beginning of their program so this change allows for the flexibility of students enrolling in the course starting in the second term.</p>
<p>Effective term and year: Spring 2016</p>

FROM	TO
<p>From (Fall 2015 Calendar):</p> <p><b>MSc in Finance</b> <b>MASTER OF SCIENCE</b></p> <p>[...]</p> <p>Program Requirements</p> <p>A minimum 3.0 grade point average (B grade) is required and completion of a minimum of 45 units from the following course list including BUS 870.</p> <p>BUS 801 - Financial Modeling Tools (3)            BUS 802 - Financial Economics I (3)            BUS 803 - Financial Econometrics (3)            BUS 805 - Financial Economics II (3)            BUS 809 - Equity Security Analysis and Portfolio Management I (3)            BUS 810 - Fixed Income Security Analysis and Portfolio Management (3)            BUS 814 - Derivative Securities I (3)            BUS 816 - Strategic Asset Allocation (3) *            BUS 818 - Derivative Securities II (3)            BUS 823 - Equity Security Analysis and Portfolio Management II (3) *            BUS 824 - Law and Regulation of Financial Institutions (3)            BUS 825 – Financial Statement Analysis (3)            BUS 826 – Portfolio Theory and Asset Pricing (3)*            BUS 857 - Numerical Methods (3)            BUS 864 - Credit Risk Management (3)**</p>	<p>To (Spring 2016 Calendar):</p> <p><b>MSc in Finance</b> <b>MASTER OF SCIENCE</b></p> <p>[...]</p> <p>Program Requirements</p> <p>A minimum 3.0 grade point average (B grade) is required and completion of a minimum of 45 units from the following course list including BUS 870.</p> <p>BUS 801 - Financial Modeling Tools (3)            BUS 802 - Financial Economics I (3)            BUS 803 - Financial Econometrics (3)            BUS 805 - Financial Economics II (3)            BUS 809 - Equity Security Analysis and Portfolio Management I (3)            BUS 810 - Fixed Income Security Analysis and Portfolio Management (3)            BUS 814 - Derivative Securities I (3)            BUS 816 - Strategic Asset Allocation (3) *            BUS 818 - Derivative Securities II (3)            BUS 823 - Equity Security Analysis and Portfolio Management II (3) *            BUS 824 - Law and Regulation of Financial Institutions (3)            BUS 825 – Financial Statement Analysis (3)            BUS 826 – Portfolio Theory and Asset Pricing (3)*</p>

BUS 865 - Market Risk Management (3) \*\*  
BUS 866 - Enterprise Risk Management (3) \*\*  
BUS 867 - Accounting for Financial Instruments (3)  
BUS 870 - Final Project for Financial Risk  
Management Students (3)  
BUS 875 – Special Topics (3)  
BUS 880 – Student Investment Advisory Service  
Internship (0)\*\*\*

Other graduate courses may be substituted for the  
courses listed above at the discretion of the  
academic director.

\* students in the investment management stream  
complete BUS 826, 816 and 823

\*\* students in the risk management stream complete  
BUS 864, 865 and 866

\*\*\* students must be enrolled in the SIAS Internship  
for the length of their program in order for  
successful completion of the course.

[...]

BUS 857 - Numerical Methods (3)  
BUS 864 - Credit Risk Management (3)\*\*  
BUS 865 - Market Risk Management (3) \*\*  
BUS 866 - Enterprise Risk Management (3) \*\*  
BUS 867 - Accounting for Financial Instruments  
(3)  
BUS 870 - Final Project for Financial Risk  
Management Students (3)  
BUS 875 – Special Topics (3)  
BUS 880 – Student Investment Advisory Service  
Internship (0)\*\*\*

Other graduate courses may be substituted for  
the courses listed above at the discretion of the  
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\* students in the investment management  
stream complete BUS 826, 816 and 823

\*\* students in the risk management stream  
complete BUS 864, 865 and 866

**\*\*\*Students must be enrolled in BUS 880  
no later than the second term of  
enrolment and throughout the program in  
order to successfully complete the course.**

[...]



## Graduate Course Change

Attach a separate document if more space is required.

Course Subject/Number BUS880	Units 0	Effective Term and Year Spring 2016
Course Title Student Investment Advisory Service Internship		
Rationale for Change: With this change, this will give us the flexibility and option to enroll students into BUS880 course during their second term (Spring term) and still satisfy the requirements to graduate from their program.		

### Proposed Changes (Check all that apply)

Course number  
  Units\*  
  Title  
  Description  
  Prerequisite  
  Other \_\_\_\_\_

### Complete only the fields to be changed

FROM	TO
Course Subject/Number	Course Subject/Number
Units	Units*
Course Title	Course Title (max 100 characters)
Course Short Title	Course Short Title (max 30 characters)
Description Students in this course will manage the Student Investment Advisory Service (SIAS) fund which includes \$10 million of the university's endowment portfolio, funded by contributions from HSBC Bank Canada and Lohn Foundation. SIAS fund follows a value investing mandate set by the client (SFU) through a conservative investment policy statement. The fund is composed of four actively managed asset classes: Cash, Canadian Equity, Global Equity and Fixed Income. SIAS fund reports monthly compliance and performance to the client and faculty advisors. Additionally, performance review presentations are held on quarterly basis.	Description Students in this course will manage the Student Investment Advisory Service (SIAS) fund which includes \$10 million of the university's endowment portfolio, funded by contributions from HSBC Bank Canada and Lohn Foundation. SIAS fund follows a value investing mandate set by the client (SFU) through a conservative investment policy statement. The fund is composed of four actively managed asset classes: Cash, Canadian Equity, Global Equity and Fixed Income. SIAS fund reports monthly compliance and performance to the client and faculty advisors. Additionally, performance review presentations are held on quarterly basis. <u>Students must be enrolled in BUS 880 no later than the second term of enrolment and throughout the program in order to successfully complete the course.</u>
Prerequisite	Prerequisite
Other	Other

\* Program requirements may need to be revised when course units are changed. Please review the calendar and submit any relevant program revisions resulting from this course change.

**REMINDER:** All course changes must be identified on a cover memo and confirmed as approved when submitted to FGSC and SGSC.

**CONTACT PERSON**

Department / School / Program Beedie, Graduate Programs	Contact name Terry Chui	Contact email busarcrd@sfu.ca
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**DEPARTMENTAL APPROVAL**

Department Graduate Program Committee Ian McCarthy	Signature 	Date May 21, 2015
Department Chair Ian McCarthy	Signature 	Date May 21, 2015

**FACULTY APPROVAL**

Faculty Graduate Studies Committee (FGSC)	Signature	Date
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**SENATE GRADUATE STUDIES COMMITTEE APPROVAL**

Senate Graduate Studies Committee (SGSC) Peter Liljedahl	Signature 	Date June 17 2015
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