

OFFICE OF THE ASSOCIATE VICE-PRESIDENT, ACADEMIC

8888 University Drive, TEL: 778.782.4636 Burnaby, BC Canada V5A 1S6

FAX: 778.782.5876

avpcio@sfu.ca www.sfu.ca/vpacademic

MEMORANDUM —			
ATTENTION	Senate	DATE	October 14, 2016
FROM	Wade Parkhouse, Acting Chair Senate Committee on	PAGES	1/1
RE:	Undergraduate Studies Beedie School of Business (SCUS 1	16-35)	Dellance

For information:

Acting under delegated authority at its meeting of October 13, 2016 SCUS approved the following curriculum revisions effective Fall 2017.

1. New Course Proposal: BUS 318-3, Management of Equity and Fixed Income Investments (Fall 2017)



# **BEEDIE SCHOOL OF BUSINESS** SIMON FRASER UNIVERSITY

**SCUS 16-35** 

MEMORANDUM			
ATTENTION	Senate Committee on Undergraduate Studies		
FROM	Andrew Gemino, Associate Dean Undergraduate Programs		
RE:	Beedie Materials for upcoming SCUS meeting		
DATE	October 3, 2016		

The Undergraduate Curriculum Committee in the Beedie School of Business has approved the following:

## Fall 2017 Changes:

- 1. New Course Proposal: BUS 318 Management of equity and fixed income investments
- 2. Program Change: Business Co-op-

Would you please place these items on the October 13, 2016 Senate Committee on Undergraduate Studies Agenda?

Sincerely,

Andrew Gemino, Associate Dean Beedie School of Business



ENGAGING THE WORLD









SENATE COMMITTEE ON UNDERGRADUATE STUDIES

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COURSE SUBJECT BUS NUMBER 318
course title LONG — for Calendar/schedule, no more than 100 characters including spaces and punctuation Management of equity and fixed income investments
course title short — for enrollment/transcript, no more than 30 characters including spaces and punctuation Management of investments
CAMPUS where course will be normally taught: Burnaby Surrey Wancouver Great Northern Way Off campus
<b>COURSE DESCRIPTION</b> — 50 words max. Attach a course outline. Don't include WQB or prerequisites info in this description box.
The selection and management of stocks and bonds within a portfolio. Using practices consistent with those of institutional investors, students will research possible investments and make decisions about investing such that benchmarks are met or exceeded. Emphasis will be placed on ethics, investment policy and socially responsible investing.
REPEAT FOR CREDIT YES NO How many times? Within a term? YES NO
LIBRARY RESOURCES NOTE: Senate has approved (S.93-11) that no new course should be approved by Senate until funding has been committed for necessary library materials. Each new course proposal must be accompanied by the email that servwes as proof of assessment. For more information, please visit <u>www.lib.sfu.ca/about/overview/collections/course-assessments</u> . Library review done? Not yet
RATIONALE FOR INTRODUCTION OF THIS COURSE
This course has been offered annually as a special topics course several times. It is taken by the BEAM (Beedie Endowment Asset Management) group of students who are engaged in investing \$5

BEAM (Beedle Endowment Asset Management) group of students who are engaged in investing \$5 million of the Beedle Endowment Funds at SFU. The students are undergraduate students who have applied for and been admitted to the BEAM Group after an extensive interview process. The students commit to be part of the BEAM Group for two years. This course provides the new group members with the skills they need to research possible investments, provide the documentation necessary to recommend an investment, physically purchase the investment, and monitor the success/failure of investments. Because the course has been offered several times as a special topics course and the BEAM group will be continuing into the future, it is time to make the course a permanent one within the Undergraduate Program.

# SFU SENATE COMMITTEE ON UNDERGRADUATE STUDIES

#### **NEW COURSE PROPOSAL**

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SCHEDULING AN	D ENROLLMENT	INFORMATION
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Term and year course would first be offered (e.g. FALL 2016) Fall 2017				
Term in which course will typically be offered Spring Summer Fall				
Other (describe)				
Will this be a required or elective course in the curriculum?				
What is the probable enrollment when offered? Estimate: 25 students				
UNITS 3				
Indicate no. of contact hours: Lecture Seminar Tutorial Lab Other; explain below				
OTHER				

## FACULTY

Which of your present CFL faculty have the expertise to offer this course?

Derrick Yee, Peter Klein	

#### WQB DESIGNATION

(attach approval from Curriculum Office)

## PREREQUISITE AND / OR COREQUISITE

BUS 312, 60 units, and permission of the instructor. This course is only open to students selected for the BEAM program.

#### EQUIVALENT COURSES

Does this course replicate the content of a previously-approved course to such an extent that students should not receive credit for both courses?

Students who have taken BUS 395 when the subject of the course was Asset Management may not take this course for further credit. This course does not count towards the Finance Concentration.



#### SENATE COMMITTEE ON UNDERGRADUATE STUDIES

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#### FEES

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Are there any proposed student fees associated with this course other than tuition fees?

O YES

🔘 NO

# **COURSE - LEVEL EDUCATIONAL GOALS (OPTIONAL)**

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#### RESOURCES

List any outstanding resource issues to be addressed prior to implementation: space, laboratory equipment, etc:

		1.0		
OTHER IMPLICATIONS				
Final exam required VES	D NO			
Criminal Record Check required	O yes	NO NO		
OVERLAP CHECK				
Checking for overlap is the responsil	olity of the Associ	ate Dean.		

Each new course proposal must have confirmation of an overlap check completed prior to submission to the Faculty Curriculum Committee.

## Name of Originator

# Maureen Fizzell