



OFFICE OF THE ASSOCIATE VICE-PRESIDENT, ACADEMIC

8888 University Drive, TEL: 778.782.4636
Burnaby, BC FAX: 778.782.5876
Canada V5A 1S6

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

MEMORANDUM

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

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)



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

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 ☒ Vancouver ☐ Great Northern Way ☐ Off campus**COURSE DESCRIPTION** — 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 serves as proof of assessment. For more information, please visit www.lib.sfu.ca/about/overview/collections/course-assessments.

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 million of the Beedie 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.

SCHEDULING AND ENROLLMENT INFORMATION

Term and year course would first be offered (e.g. FALL 2016) Term in which course will typically be offered ☐ Spring ☐ Summer ☒ FallOther (describe) Will this be a required or elective course in the curriculum? ☐ Required ☒ ElectiveWhat is the probable enrollment when offered? Estimate:

UNITS

Indicate number of units: 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?

WQB DESIGNATION

(attach approval from Curriculum Office)

PREREQUISITE AND / OR COREQUISITE

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?

FEES

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

☐

YES

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NO

COURSE – LEVEL EDUCATIONAL GOALS (OPTIONAL)**RESOURCES**

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

OTHER IMPLICATIONS

Final exam required

☐

YES

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NO

Criminal Record Check required

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YES

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NO

OVERLAP CHECK

Checking for overlap is the responsibility of the Associate 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