WHY STUDY INVESTMENT MANAGEMENT?
If you’re intrigued by how individuals and organizations can grow wealth through investment portfolios, the Investment Management Certificate Program will challenge you with an intense, applied 17-month educational opportunity.

You’ll build an outstanding foundation for portfolio management, gaining a substantial competitive edge for pursuing a career as an investment analyst, financial analyst, investment adviser, or even to become an independent financier.

As an IMCP student, you’ll carry out all of the duties that professional investors do – leaving the program with analyst-level skills. The program is applied in nature. That means you’ll learn about investments in a traditional class setting and by managing a real money investment portfolio. You’ll be exposed to a broad spectrum of investment-related subjects, with an emphasis on intensive research and applied training in complex financial tools and techniques.

In addition to a rich curriculum, IMCP students meet regularly with investment professionals during and outside of class for discussions of the funds, markets, and course topics. The IMCP also has organized trips to meet with investment managers in Chicago, Madison, Milwaukee, and New York, and to the Berkshire Hathaway Annual Meeting in Omaha.

The Lubar School of Business is part of the prestigious Charted Financial Analyst (CFA) Institute University Recognition Program. Our students are prepared for and encouraged to sit for the CFA examination.

CERTIFICATE OUTLINE
Some grade requirements, admission to major requirements and course restrictions may apply. Non-business students may have additional requirements. Be sure to see a Lubar academic advisor for more information.

BUS ADM 452 Applied Portfolio Management
BUS ADM 454 Analysis of Options and Futures
BUS ADM 551 International Investments
BUS ADM 552 Investment Management Practice I
BUS ADM 553 Investment Management Practice II
BUS ADM 554 Investment Management Practice III

TOTAL: 18 CREDITS

QUESTIONS? PLEASE CONTACT
Undergraduate Student Services • Lubar Hall, N297
414-229-5271 • uwmbba@uwm.edu • lubar.uwm.edu
COURSE DESCRIPTIONS

BUS ADM 452 Applied Portfolio Management

BUS ADM 454 Analysis of Options and Futures
Valuate interest rate, equity, and stock index futures and options. Develop strategies using these instruments in hedging interest rate and equity portfolio risk. Prereq: jr st and admission to Bus Adm major; Bus Adm 451.

BUS ADM 551 International Investments

BUS ADM 552 Investment Management Practice I
Introduction to the real-time and historic data sets available in the David O. Nicholas Applied Finance Lab. Utilize Bloomberg, FactSet, and other analysis packages. Prereq: jr st, admission to Investment Mgmt Cert program and Bus Adm 451; or grad st, admission to Investment Mgmt Cert program and Bus Adm 771.

BUS ADM 553 Investment Management Practice II
Students manage an investment portfolio utilizing the David O. Nicholas Applied Finance Lab. Topics include securities selection, portfolio hedging, behavioral finance, and financial market events. Prereq: jr st, admission to Investment Mgmt Cert program & Bus Adm 552; or grad st, admission to Investment Mgmt Cert program and Bus Adm 552.

BUS ADM 554 Investment Management Practice III
Students independently conduct special study to assist individual future professional development and gain maturity and confidence in real world investment management. Prereq: jr st, admission to Investment Mgmt Cert program and Bus Adm 553; or grad st, admission to Investment Mgmt Cert program and Bus Adm 553.

Internship Requirement
Students completing the certificate are also required to have an internship experience prior to graduation from the certificate program. The internship experience must be approved by the IMCP director.

IMCP Admission Process
Admission is competitive and is based on cumulative GPA, quantitative-related course grades, personal statement, a possible interview and interview essay, interest in investments and finance, and other considerations. Please see a Lubar academic advisor for more details.

February 2015