

UNDERGRADUATE CERTIFICATE IN

# INVESTMENT MANAGEMENT

## 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 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, totaling about three million**. 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.**

IMCP students will also participate in an internship experience with hands-on training prior to graduation.

## 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.

## QUESTIONS? PLEASE CONTACT

Undergraduate Student Services • Lubar Hall, N297  
414-229-5271 • [uwmbba@uwm.edu](mailto:uwmbba@uwm.edu) • [lubar.uwm.edu](http://lubar.uwm.edu)



## YEAR ONE

### FALL

<b>BUS ADM 550</b>	Investment Management Practice I
<b>BUS ADM 450</b>	Intermediate Finance*
<b>BUS ADM 451</b>	Investment Finance*

### SPRING

<b>BUS ADM 552</b>	Investment Management Practice II
<b>BUS ADM 457</b>	Financial Modeling
<b>BUS ADM 301</b>	Intermediate Accounting**

## 21 CREDITS

## YEAR TWO

### FALL

<b>BUS ADM 553</b>	Investment Management Practice III
<b>BUS ADM 452</b>	Applied Portfolio Management
<b>BUS ADM 454</b>	Analysis of Options and Futures

### SPRING

<b>BUS ADM 554</b>	Investment Management Practice IV
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\*These courses are required to meet the prerequisites of the certificate program.

\*\*If not taken in sophomore year.

## CERTIFICATE COURSE DESCRIPTIONS

### **BUS ADM 452 Applied Portfolio Management**

Study institutional setting, legal framework, portfolio strategies, and innovations in investment markets. Explore securities valuation, risk management, behavioral study, and prospects of market developments. *Prereq: jr st; advancement to Bus Adm major; Bus Adm 451.*

### **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 advancement to Bus Adm major; Bus Adm 451.*

### **BUS ADM 457 Financial Modeling**

Development and application of computer-based financial models. Models from corporate finance and investments use Microsoft Excel and Visual Basic for Applications (VBA). *Prereq: jr st & admis to Bus Adm major; Bus Adm 450(P) & 451(P).*

### **BUS ADM 550 Investment Management Practice I**

Introduction to real-time and historic data sets and analytical software available in the David O. Nicholas Applied Finance Lab. Utilize Bloomberg and FactSet. Produce a stock report, including analysis of drivers, financial statements, and valuation. *Prereq: jr st, admis to Investment Mgmt Cert program, Bus Adm 450(C); or grad st, admis to Investment Mgmt Cert program, Bus Adm 705(C).*

### **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.*