



INSTITUTO UNIVERSITARIO DE INVESTIGACIÓN
EN ESTUDIOS NORTEAMERICANOS
"BENJAMIN FRANKLIN"

Course	Introduction to Financial Analysis
Program, semester, year	International Studies Program, Spring 2024
Credits ECTS	4,5 (3 USA)
Instructor's full name and email	David Birkett - dbirkett@dbq.edu
Block dates (days and time)	Monday-Thursday, 9am-12pm
Classroom	TBA
Class hours	36
Office Hours	TBA
Requirements	Smart phone
Language of instruction	English
Type of teaching	In person

INTRODUCTION

- Understand what stocks and bonds are and how to calculate their value.
- Why did SVB fail? You will have a clear understanding of this after the course.
- Do you want to be able to know if an investment is worth the money you are putting at risk?
- Are you interested in how business make investment decisions?

COMPETENCES

General Competences (GC):

GC1: Understand the three primary financial statements

GC2: How do businesses raise funds for investments?

Specific Competences (CE):

SC1: Evaluate the Income Statement

SC2: Calculate the cost of running a business

METHODOLOGY

Half of the class will be lecture based. The other half will involve the practical hands-on calculations that will be done in class together.

PREPARATION FOR CLASS

A text like this can be included:

- *Students will need to review the supplied presentation slides before each class.*
- *Student should think about questions to ask in class of areas that are not clear to them*
- *The student should have at least one question to raise in every class.*
- *Student takes notes during class presentation and discussions.*

EVALUATION

The evaluation of this course is as follows:

PARTICIPATION	15%
NOTE TAKING AND ASSIGNMENTS	15 %
MIDTERM EXAMS	30%
FINAL EXAMS	30%
ORAL PRESENTATION	10%

Plagiarism:

Plagiarism is a violation of academic norms and as such it can result in a failed course. In extreme cases it can include the expulsion from the program. In order to avoid this, it is recommended to remind students of how to cite and rephrase the works of authors when writing papers.

ATTENDANCE (Instituto Franklin-UAH Policy)

Attendance is mandatory. Students are not permitted to miss any classes of the program without proper justification (i.e. emergencies, health problems, in this case students have to show a medical note). The following types of excuses are not justified: family visits, illnesses without a medical note, personal trips, etc. Each unjustified absence will result in a grade deduction of 10 points in the final grade of the class (example: from A to B). Students will not be allowed, in the classroom or fieldtrips, to arrive 10 minutes late or more. If a student has continual delays, he/she will be penalized with an absence and the instructor may not allow them into class or the visit.

STUDENTS WITH SPECIAL NEEDS (Instituto Franklin-UAH Policy)

Students with special needs should contact Antonio Fernández: antonio.fernandezm@uah.es Instituto Franklin-UAH can accommodate these students who show through a medical note or a note from their academic advisor that require help in order to fulfill the program.

USE OF TECHNOLOGY IN CLASS

The use of technology is essential today in education, but if is used inappropriately it can be harmful for students. It is necessary that students ask for permission from the teacher in order to use any technological devices. Faculty should make clear to students in what instances technology can be used.

CLASS SHCEDULE

DAYS	CLASS SCHEDULE	ASSIGMENTS
MONTH		
BLOCK		
	Content	
	Exams	
	Holidays	

INSTRUCTOR

DAVID BIRKETT

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CAREER OBJECTIVE

To Educate/Share 30 years of Operations, Finance, Marketing and Human Resources experiences with students/business leaders.

PROFILE

- Offer numerous years of operational management experience with expertise in manufacturing, & Finance
- Sharp business acumen and depth of knowledge in budgeting and financial administration, sales and marketing, staff training and development, maintaining safety, and key account management
- Facilitate client-focused, quality-oriented environment vital to maximizing customer satisfaction and retention; demonstrated ability to identify and address client-specific needs
- Solid record of cost-effectively increasing productivity using "Lean" practices; strategically plan and coordinate workflow and human resources for optimal coverage while containing labor costs
- Ensure compliance with all government regulations, safety standards, and corporate policies
- Dynamic communication, presentation, negotiation, and relationship management skills

PROFESSIONAL EXPERIENCE

University of Dubuque

Assistant Professor

8/13 - Present

Instructing undergraduate and graduate classes in Management, Finance and Strategy.

Advising students to help integrate their career goals with subject matter

