

# FINANCE, INSURANCE, AND REAL ESTATE

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Not all courses are offered every semester. Refer to the schedule of courses for each term's specific offerings.

More Info (<https://one.ufl.edu/soc/>)

*Unless otherwise indicated in the course description, all courses at the University of Florida are taught in English, with the exception of specific foreign language courses.*

## Department Information

The Finance, Insurance and Real Estate Department offers degree programs at the doctoral, masters, and undergraduate level. Besides standard finance offerings, specialized academic programs in entrepreneurship, real estate, and value investing are available. The department's faculty boasts top experts on topic matter as diverse as banking, initial public offerings, investments, international finance, mergers, and acquisitions and real estate.

**Website** (<https://warrington.ufl.edu/finance-insurance-and-real-estate-department/>)

### CONTACT

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Map (<http://campusmap.ufl.edu/#/index/0029>)

### Curriculum

- Combination Degrees
- Entrepreneurship Minor
- Finance
- Real Estate Minor

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## Courses

### FIN 2951 Special Projects 1-3 Credits

**Grading Scheme:** S/U

Projects related to finance as approved by the college.

### FIN 3124 Introduction to Financial Planning & Wealth Management 4 Credits

**Grading Scheme:** Letter Grade

An examination of the financial planning process, professional conduct and regulation, and education planning. Students analyze personal financial information, construct financial statements, develop financial strategies, and understand the components of a written financial plan.

**Prerequisite:** FIN 3403.

### FIN 3403 Business Finance 4 Credits

**Grading Scheme:** Letter Grade

The acquisition and management of funds by business. A minimum grade of B is required in FIN 3403 to register for required finance major courses.

**Prerequisite:** (ACG 2021 and junior standing or higher) or (ACG 2021 and ECO 2023 and sophomore standing).

### FIN 4128 Financial Plan Development 4 Credits

**Grading Scheme:** Letter Grade

Capstone course in financial planning. Covers retirement needs, individual, corporate, and government retirement plans, plus group benefits plans.

Examines professional issues in financial planning, including ethical considerations, regulation and certification requirements, written and oral communication skills, and professional responsibility. Students develop a comprehensive financial plan.

**Prerequisite:** Any two of FIN 3124, FIN 4132, or RMI 3011.

**Corequisite:** FIN 3124 or FIN 4132 or RMI 3011 if not used above.

**Attributes:** Artificial Intelligence

### FIN 4132 Estate & Tax Planning 4 Credits

**Grading Scheme:** Letter Grade

A focus on the fundamentals of estate planning, including the transfers of wealth by gift or at death. Trusts, guardianships and post mortem planning are covered. Also covers the taxation of income by federal government, focusing on the planning and preparation of federal tax returns around estate planning.

**Prerequisite:** FIN 3403 with a minimum grade of C.

**FIN 4243 Debt and Money Markets 4 Credits**

**Grading Scheme:** Letter Grade

Examines financial markets, the institutions and instruments associated with debt funds, and the determinants of the general level and structure of interest rates.

**Prerequisite:** (FIN 3403 with a minimum grade of B) and (ACG 2021 and ACG 2071 with minimum grades of C).

**FIN 4403 Honors Finance 2 Credits**

**Grading Scheme:** Letter Grade

Variable topics providing opportunity for in-depth study of topics not offered in other courses.

**Prerequisite:** FIN 3403 with grade of A.

**FIN 4414 Financial Management 4 Credits**

**Grading Scheme:** Letter Grade

An integrative examination of theory and practice of managerial finance, financing and investing decisions as affected by risk, timing and financial markets.

**Prerequisite:** FIN 4504 and ACG 3101.

**FIN 4453 Financial Modeling 4 Credits**

**Grading Scheme:** Letter Grade

Demonstrates how intricate financial spreadsheet models, along with other modeling tools, can be developed and applied in value creating activities for businesses such as securities modeling, financial statement cash flow modeling, and derivatives modeling.

**Prerequisite:** FIN 3403 with a minimum grade of B and (ACG 2021 and ACG 2071 with minimum grades of C).

**FIN 4504 Equity and Capital Markets 4 Credits**

**Grading Scheme:** Letter Grade

Examines financial markets, the institutions and instruments associated with equity funds, the mechanics and mathematics of stock prices, security analysis, and the factors influencing stock values.

**Prerequisite:** (FIN 3403 with a minimum grade of B) and (ACG 2021 and ACG 2071 with minimum grades of C).

**FIN 4533 Financial Derivatives 2 Credits**

**Grading Scheme:** Letter Grade

The course defines the main kind of derivatives, shows how they are used to achieve various hedging and speculating objectives, introduces a framework for pricing derivatives and studies several applications of derivative-pricing techniques outside derivative markets.

**Prerequisite:** FIN 4504 or FIN 4243

**FIN 4905 Independent Research 1-4 Credits**

**Grading Scheme:** Letter Grade

A written report or reports will be required.

**Prerequisite:** senior standing, previous work in the area of research and department permission.

**FIN 4934 Special Topics 1-4 Credits**

**Grading Scheme:** Letter Grade

Special topics in entrepreneurship related fields of study.

**FIN 4956 International Studies in Finance 1-4 Credits**

**Grading Scheme:** Letter Grade

This course provides a mechanism by which coursework taken at a foreign university as part of an approved study abroad program can be recorded on the transcript and counted toward UF graduation.

**FIN 4970 Honors Thesis 1 Credit**

**Grading Scheme:** S/U

A thesis is required for award of magna cum laude or summa cum laude designation. To qualify for the thesis option, students normally will have completed 90 semester credits of coursework (exceptions may be made by the honors coordinator) and must have at least the 3.6 GPA required for high honors at the time they enroll. The thesis will be reviewed by at least one faculty member chosen by the honors coordinator from the student's major department.

**Prerequisite:** 90 credits earned and a 3.6 UF GPA.

**REE 2951 Special Projects 1-3 Credits**

**Grading Scheme:** S/U

Projects related to business real estate as approved by the college.

**REE 3043 Real Estate Analysis 4 Credits**

**Grading Scheme:** Letter Grade

Principles of real estate decision making within the context of our economic, social, legal and political-government systems.

**Prerequisite:** ACG 2021 or AEB 3133 or AEB 3144 or BCN 4753.

**REE 4303 Real Estate Investment Decision Making 4 Credits**

**Grading Scheme:** Letter Grade

Explores real estate investment and the demands, skills and challenges of decision-making for those who make such investments.

**Prerequisite:** REE 3043 with a minimum grade of C.

**REE 4905 Independent Research 1-4 Credits**

**Grading Scheme:** Letter Grade

A written report or reports will be required.

**Prerequisite:** Senior standing or higher, previous work in the area selected for research and instructor and department chair permissions.

**REE 4970 Honors Thesis 1 Credit**

**Grading Scheme:** S/U

A thesis is required for award of magna cum laude or summa cum laude designation. To qualify for the thesis option, students normally will have completed 90 semester credits of coursework (exceptions may be made by the honors coordinator) and must have at least the 3.6 GPA required for high honors at the time they enroll. The thesis will be reviewed by at least one faculty member chosen by the honors coordinator from the student's major department.

**Prerequisite:** 90 credits earned and a 3.6 UF GPA.

**RMI 3011 Risk Management and Insurance 4 Credits**

**Grading Scheme:** Letter Grade

Identification of various types of risks; principles underlying selection of appropriate means of handling risks; introduction to life, health, property, liability and other area of insurance.

**Prerequisite:** ACG 2021 or ECO 2013 or ECO 2023.

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