

Leveraging your Math degree in the field of finance

PACIFIC LUTHERAN UNIVERSITY SCHOOL OF BUSINESS MASTER OF SCIENCE IN FINANCE (MSF)

YOUR QUANTITATIVE SKILLS

Those with a degree in mathematics may be surprised to learn that the abilities they have acquired are in high demand in the financial sector. Whether it is developing predictive models, analyzing portfolio risk, or calculating the value of a company, high-level quantitative skills are the foundational keys to success in the financial sector.

The PLU Master of Science in Finance program is designed to help graduates hone the quantitative abilities they developed in their undergraduate mathematics work into practical, industry relevant skills that are in high demand in the financial sector. Our program provides students with a thorough understanding of accounting, economics, and finance in order to position them as well-rounded masters degree holders.

Equipped with the knowledge from a well-designed master's degree, students will be ready to explore a wide range of career options in finance. From small privately held companies and investment firms to large corporations, the need for financial experts is strong with ample opportunities. The time to enter this exciting and challenging industry is now.

MSF PROGRAM

The MSF is jointly offered by faculty from Finance, Mathematics, Economics and Accounting to provide a cross-disciplinary education that uniquely prepares graduates to excel in financial careers. It is a 10-month, full-time, quantitatively rigorous degree program offered to new graduates as well as those with industry experience. A new cohort begins each September.

MSF VISION

The PLU MSF is pragmatic and industry-focused, yet grounded in its cross-disciplinary foundations. Graduates are equipped to hit the ground running with a powerful set of skills and tools from a curriculum designed in collaboration with industry.

CFA ALIGNMENT

An unique aspect of the PLU MSF is its association with the CFA Institute and the opportunity to work toward the Chartered Financial Analyst designation while simultaneously earning your master's degree. The CFA credential, with three levels of examinations, is considered by many to be the gold standard for professionalism and knowledge in the world of finance.

"The CFA Program is a globally recognized, graduate level curriculum that provides a strong foundation of real-world investment analysis and portfolio management skills along with the practical knowledge you need in today's investment industry. It also emphasizes the highest ethical and professional standards." –CFA Institute

As the only official CFA Institute University Recognized Program in the Pacific Northwest region, the fall semester covers much of the CFA Level I content, while the January term and spring semester prepare students for the Level II examination. Session timing allows interested students to sit for the Level I exam in December and for the Level II exam in June. While it can be of great benefit professionally, participation in the CFA exams is optional for students.

PROGRAM HIGHLIGHTS

- Degree:** Master of Science in Finance
- Format:** 10-month program, September-June
40 semester credit hours
Full-time cohort model
Four-credit courses plus 2-4 credit capstone
Internship, optional
- Calendar:** 14-week semesters, 4-week January and June courses.
- AACSB:** PLU School of Business accreditation since 1971. Less than 5% of universities worldwide have achieved this elite distinction.
- Faculty:** Jointly offered by Finance, Accounting, Mathematics, and Economics faculty.
- CFA:** CFA Institute University Recognized Program.
- Technology:** Students must have their own computers. Dedicated computer labs in Morken available.
- Location:** Courses are offered at the PLU campus in Tacoma, Washington. The greater Puget Sound region, from Tacoma to Seattle, is home to asset and wealth management firms with approximately US\$400B under management, and is home to some of the world's largest firms.
- Tuition:** Tuition for 2014-15 is US\$38,800
- Housing:** PLU offers affordable on-campus housing.

ACADEMIC SCHOLARSHIPS AVAILABLE

MORKEN CENTER

The School of Business offers MSF courses in the Morken Center. It offers state-of-the-art technology in its classroom spaces and computer facilities.

OPPORTUNITIES

- Gary Baughn MSF Student Investment Fund with over \$100,000 managed independently by a MSF student team
- Graduate fellowships
- Intensive credit-bearing internship opportunities during January term
- Participation in CFA Pacific Northwest Investment Research Challenge
- Ongoing PLU School of Business Research Series

CURRICULUM

Fall Semester (16 cr)

- ECON 503** Economics for Finance
- BMSF 505** Financial Econometrics
- BMSF 512** Financial Accounting: Reporting & Analysis I
- BMSF 514** Foundations of Finance

January Term (4 cr - Rotating Offering)

- ECON 516** International Economics
- BMSF 518** Financial Accounting: Reporting & Analysis II
- BMSF 530** Financial Markets, Institutions & Intermediaries
- BMSF 595** Internship

Spring Semester (16 cr)

- BMSF 507** Mathematical and Stochastic Foundations for Finance
- BMSF 532** Valuation, Fixed Income, Derivatives, Alternatives
- BMSF 534** Portfolio Theory and Management
- BMSF 536** Advanced Corporate Finance

June Term (4 cr)

- BMSF 538** Portfolio Reporting, Rebalancing & Performance Attribution
- BMSF 599** Capstone: Integration and Graduate Research in Finance

ADMISSIONS REQUIREMENTS

- Bachelor's degree by time of entry
- Undergraduate GPA of 3.0 and higher
- Official GMAT or GRE scores
- International students: TOEFL-iBT score of 88 or minimum IELTS score of 6.5 (may be waivable)
- Application and brief essays
- Fast-track admission: Undergraduate GPA of 3.5 or above and a GMAT over 600

ETHICS IN THE CURRICULUM

The ethical guidelines for a Chartered Financial Analyst are embedded in the MSF curriculum. Ethics discussion includes professionalism, market integrity, duties to clients and employers, conflicts of interest, and responsibilities as a CFA Institute member or candidate. The CFA guidelines uphold integrity, competence, diligence, respect, and ethical behavior with all stakeholders. Please see <http://www.cfainstitute.org/ethics/codes/ethics>.

INDUSTRY CONNECTIONS

- **Money Management:** Russell Investments, Parametric Portfolio Associates, Milliman, Rainer Investment Management, Freestone Capital Management, Blackrock
- **Local Public Corporations:** Microsoft, Amazon, Costco, Nordstrom, Paccar, Alaska Airlines, Starbucks
- **Risk Management/Insurance:** State Farm, Symetra, Liberty Mutual, Premera
- **Public/Regulatory Organizations:** Federal Home Loan Bank, FDIC Seattle, WA State Dept of Retirement Systems
- **Investment/Commercial Banking:** J.P. Morgan Chase, D.A. Davidson, Cascadia Capital, Pacific Crest Securities, Bank of NY Mellon, KeyBank

PARTICIPATING FACULTY



Jeffrey Stuart, Ph.D.
Mathematics Department
Head of BS in Financial
Mathematics degree program



Kevin K. Boeh, Ph.D.
Finance faculty, former
investment banker, 15+ years
industry experience



Lynn Hunnicutt, Ph.D.
Economics Department Chair;
Director, PLU Center for Vocation



Ufuk Ince, Ph.D., CFA
Finance faculty, trustee
and board member of CFA
Society of Seattle, Registered
Investment Advisor



Tim Mooney, Ph.D.
Finance faculty, former
Assist. President, Deutsche
Bank AG; Head of the Graduate
Student Investment Fund



Martin Wurm, Ph.D.
Economics faculty, financial
economics, money and
banking, and macroeconomics



Gaurav Gupta, Ph.D.
Accounting faculty, financial
accounting and reporting,
Beta Alpha Psi Advisor

SELECTED EXECUTIVE ADVISORY BOARD MEMBERS



Darcy Johnson, Principal,
Managing Partner, Fulcrum
Capital, LLC.
PLU Graduate 1978, 1982



Steve Maxwell, President,
South Puget Sound District
KeyBank
PLU Graduate 1990



Brenda Morris, CFO,
5-11 Tactical
PLU Graduate 1991

SCHOOL OF BUSINESS



Nancy Albers-Miller, Ph.D.
Dean, School of Business



Michael Renfrow, M.P.A.
Associate Director, MSF
Program



FOR MORE INFORMATION:

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