

Warrington College of Business Administration
Hough Graduate School of Business
School of Business
Fisher School of Accounting

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GENERAL FACULTY MEETING

AGENDA | Thursday, October 8, 2009 | 4:00 p.m. | Stuzin 103

1. Matt Fajack, Vice President and Chief Financial Officer will be talking about RCM
2. Eric Olson talking about Warrington.ufl.edu Project:
 - Address Changeover
 - UFAD Conversion
3. The September 8, 2009 General Faculty Meeting Minutes is presented for approval by the faculty
4. The Undergraduate Committee approved the following item and requests approval by the faculty:

Name Change for Minor:

<i>Previous name:</i>	<i>Information Systems and Operations Management</i>
<i>New name:</i>	<i>Information Systems</i>

5. Other Business
6. Dean's Report

GRADUATE FACULTY MEETING

AGENDA | Thursday, October 8, 2009 | 4:00 p.m. | Stuzin 103 (immediately following General Faculty Meeting)

1. The September 8, 2009 Graduate Faculty Meeting Minutes is presented for approval by the faculty
2. The Specialty Masters Committee has approved the following and requests approval by the Graduate Faculty:

New Courses: (attached)

FIN 6559 – Personal Finance Management

- ♦ Credits: 1 - Repeatable for up to 2 credits
- ♦ Prereq/Coreq: Designed for MBA students
- ♦ Description: Personal financial planning

Course Changes:

FIN 6642 – Global Entrepreneurship

- ♦ Change Prefix to: GEB
- GEB 6642 – Global Entrepreneurship**

ISM 6236 – Business Objects

♦ Prereq/Coreq:

OLD	ISM 6216, ISM 6223 & ISM 6258
NEW	ISM 6215, ISM 6222 & ISM 6259

MAN 6528 – Principles of Logistics / Transportation Systems

♦ Prereq/Coreq:

OLD	None
NEW	QMB 6755

3. Other Business

4. Dean's Report

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GENERAL FACULTY MEETING

MINUTES | Tuesday, September 8, 2009 | 10:00 a.m. | Stuzin 104

1. The April 8, 2009 General Faculty Meeting Minutes were presented for approval by the faculty. A motion was made to approve the minutes. The motion was seconded and the faculty voted to approve the minutes as distributed.
2. The Undergraduate Curriculum Committee approved the proposals to reinstate the Minor and Entrepreneurship and the Minor in Real Estate. A motion was made to approve the proposals as presented. The motion was seconded and the faculty voted to reinstate the Minor in Entrepreneurship and the Minor in Real Estate.
3. Other Business
 - New faculty were introduced
 - Dr. Marcus Kirk, Assistant Professor in the Fisher School of Accounting
 - Dr. David Reppenhagen, Assistant Professor in the Fisher School of Accounting
 - Dr. Evan Dudley, Assistant Professor in the Finance, Insurance & Real Estate Department
 - Dr. Sugata Ray, Assistant Professor in the Finance, Insurance & Real Estate Department
 - Brian Ray talked about the recent memo that was circulated in regards to planning guidance for maintenance of accreditation. The accreditation is scheduled for 2014 and a planning strategy has been implemented to insure a successful review. The following committees will begin their work:
 - Strategic Planning Committee - Chaired by Rich Lutz
The committee will include faculty, staff, students, and other stakeholders. The committee will produce a report for review by the faculty at the end of the Spring 2011 term.
 - AQ/PQ Standards Committee – Chaired by Selcuk Erenguc
The committee will include Academic Unit Heads and four lecturers: Fiona Barnes, Debbie Garvin, Bill Rossi, and Craig Tapley.
 - Assurance of Learning – Four AoL Faculty Leads
 - BSBA & BABA: Chair of the Undergraduate Committee (currently Rich Lutz; -Mark Rush in Fall '10).
 - BSAc & MAcc: Chair of the FSOA Curriculum Committee (Sandy Kramer)
 - MBA: Chair of the MBA Committee (Joel Houston)
 - Specialized Master's: John Kraft in conjunction with the Specialized Graduate Programs Committee
4. Dean's Report – no report provided

A motion was made to adjourn the meeting. The motion was seconded and the meeting adjourned at 10:10 a.m.

GRADUATE FACULTY MEETING

MINUTES | Tuesday, September 8, 2009 | 10:00 a.m. | Stuzin 104 (*immediately following General Faculty Meeting*)

1. The April 8, 2009 Graduate Faculty Meeting Minutes were presented for approval by the faculty. A motion was made to approve the minutes. The motion was seconded and the faculty voted to approve the minutes as distributed.
2. The Ph.D. Curriculum Committee approved the following items and presented them for approval by the faculty. A motion was made to approve the items as presented. The motion was seconded and the following new courses and course change was approved by the faculty.

New Courses:

ECP 7407 – Theory of Industrial Organization: Product Differentiation and Strategy

- ♦ **Credits:** Variable 1-2
- ♦ **Contact Hours:** 2 base hours
- ♦ **Prerequisites:** ECO 7115, ECO 7404, ECO 7117
- ♦ **Description:** A review of undifferentiated oligopoly, then focuses on oligopoly with differentiated products, modern monopolistic competition models, strategic moves in oligopoly.

ECP 7419 – Current Research in Regulation

- ♦ **Credits:** Variable 1-2
- ♦ **Contact Hours:** 2 base hours
- ♦ **Prerequisites:** None
- ♦ **Description:** This course will emphasize on current research topics in regulation, with emphasis on energy, environment, telecommunications, and water, with an objective of preparing students to contribute to this research.

Course Changes:

ECO 7536 - Theoretical Public Economics

- ♦ **Change Description**
 - OLD:** Topics related to externalities, public expenditure, optimal taxation, and social choice.
 - NEW:** The course is concerned primarily with public goods and their provision.

3. Other Business –

Selcuk Erenguc reported on the following:

- The construction of Hough Hall is on schedule and expected to be ready to occupy by May 2010
- The Post-Doc Bridge program graduated 16
- Sabbatical notices for 2010-11 expected to go out today
- There has been some mention of a possible pay raise in the spring for faculty

4. Dean's Report –

Dean Kraft reported on the following:

- Matt Fajack, CFO here at UF is expected to talk with the AUH's and the Faculty at one of the upcoming meetings. He will focus on RCM Model 9.
- The stimulus package resulted in one year funding for lecturers; the departments would pick up after one year. Hiring will be in Accounting; Real Estate; Entrepreneurship; and Finance Entrepreneurship. Funding was provided out of the stimulus money but in the future it will be funded out of tuition money.
- There is still \$11 million shortfall which will be covered by colleges. Our share is \$300,000 and the Provost will take vacant positions to cover this.
- We can defer and wrap up in bond sharing.
- Overall the budget is improving – we are in relatively good shape with RCM.
- Our Capital Campaign priorities are: name the school of business; construct the school of business; and professorships.
- Expect FTE Funding will shrink as tuition goes up.
- Expect 15% increase in tuition – hoping it will be in-state not out-of-state.

A motion was made to adjourn the meeting. The motion was seconded and the meeting adjourned at 10:25A.

Attendees (Faculty/Graduate Faculty Meeting): John Kraft, Selcuk Erenguc, Brian Ray, Gary McGill, Stan Smith, Sanford Berg, David Sappington, Joe Alba, Fiona Barnes, Jinhong Xie, Deb Mitra, Sugata Ray, Steven Slutsky, Marcus Kirk, David Reppenhagen, Evan Dudley, Larry DiMatteo, Lyle Brenner, Richard Lutz, Bill Rossi, Arnie Heggstad

PART 1: TO BE COMPLETED BY THE INSTITUTION

Institution Name: University of Florida	Institutional Code: 001535	Instructional Unit or Department Name, Department Code: 11706000/Finance, Insurance and Real Estate
Recommended SCNS Course Identification: Discipline (SMA) <u>1</u> <u>3</u> <u>1</u> Prefix <u>F</u> <u>I</u> <u>N</u> Level <u>6</u> Course Number <u>5</u> <u>5</u> <u>9</u> Lab Code _____		
Institution's Course Title: <u>Personal Financial Management</u>		
Effective Term and year course will first be offered: <u>Spring 2010</u>		
Amount of Credit: <u>01</u>	Contact hour base <u>1</u> or Headcount _____	If Repeatable Credit or Variable Credit: <u>2</u> total repeatable credit allowed <u>1</u> minimum / <u>2</u> maximum credit within a semester
Course Description (attach a course syllabus): Personal financial planning.		Mark all that apply: Rotating Topic <input type="checkbox"/> yes <input checked="" type="checkbox"/> no S/U Only <input type="checkbox"/> yes <input checked="" type="checkbox"/> no Repeatable for Credit <input checked="" type="checkbox"/> yes <input type="checkbox"/> no
Prerequisites: (This form does not update ISIS or registration prerequisite checking.) designed for M.B.A. students		
Corequisites:		
All faculty teaching this course have completed at least 18 graduate semester hours in the teaching discipline and hold at least a master's degree. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
Degree Type (Mark all that apply): <input type="checkbox"/> Associate of Arts <input type="checkbox"/> Baccalaureate <input checked="" type="checkbox"/> Graduate Study <input type="checkbox"/> Other (specify):		
Category of Instruction: <input checked="" type="checkbox"/> Introductory <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced		
Department Contact, Telephone Number, Email Address and PO Box: Priscilla Kenney, 392-0145, priscilla.kenney@cba.ufl.edu, 117168		(Date)
College Contact, Telephone Number, Email Address and PO Box: Sharon Haughton, 273-3225, sharon.haughton@cba.ufl.edu, 117150		(Date)

PART 2: TO BE COMPLETED BY THE FACULTY DISCIPLINE COMMITTEE REPRESENTATIVE

Approved Course Classification (Prefix, Number, Lab Code):

If not the same as recommended by institution, please explain:

SCNS Course Title (if new): _____
Decade Title (if new): _____
Century Title (if new): _____
_____ Signature, Faculty Discipline Committee Representative:
_____ Date:

NEW COURSE UCC-1 FORM

INSTRUCTIONS FOR COMPLETION OF PART 1

The New Course Transmittal form is used for transmitting new course information to the Statewide Course Numbering System (SCNS):

1. Institutional **RECOMMENDATIONS** regarding prefixes and course numbers for new courses.
2. Additional course information to be recorded in the SCNS inventory.
3. Supporting documentation for use by the faculty discipline coordinator in reviewing and assigning a prefix and course number.

All information requested on this form is necessary for the efficient and timely maintenance of the SCNS inventory. Thus, all items on Part I must be completed and the course syllabus attached before it is forwarded to the Florida Department of Education (DOE).

The following instructions and definitions are provided to clarify items to be completed on the New Course Transmittal form.

Department Name/Department Code: Academic unit and code number of department code responsible for teaching the course. Use complete name, not abbreviations or acronyms.

Recommended SCNS Course Identification: (Subject to approval by the appropriate Faculty Discipline Coordinator based on SCNS taxonomy and course classification system.)

Discipline (SMA): A three-digit code representing a broad Subject Matter Area. This code can be obtained from the SCNS handbook.

Prefix: A three-letter code indicating placement of a course within the discipline.

Level: A one-digit code preceding the course number that indicates the level (e.g., freshman, sophomore, etc.) at which the course is to be taught. This number is to be recommended by the institution according to state and institutional policy.

Course Number: A three-digit code indicating the specific content of the course based on the SCNS taxonomy and course equivalency profiles.

Lab Code: This code is left blank if the course is a lecture course (has no laboratory component). The letter "C" may be used to indicate a combination of lecture and laboratory. An "L" indicates a laboratory course for which there may or may not be an associated lecture course.

Institution's Course Title: The title of the course as it is to appear in the catalog.

Effective Date: Provide term and year in which the course will be first offered.

Number of Credits: The amount of credit is regulated by Rule 6A-10.033, FAC.

Contact Hours: "Base" contact hours are determined by dividing the total number of classroom meeting hours per semester by the number of weeks in the semester. For example,

$$\frac{8 \text{ (hours class meets per week)} \times 4 \text{ (number of weeks class meets)}}{16 \text{ (number of weeks in semester)}} = \frac{32}{16} = 2 \text{ Base Contact Hours}$$

"Headcount" contact hours are determined by dividing the average number of hours the instructor meets with one student during the semester by 3 times the number of weeks in the semester. For example,

$$\frac{1 \text{ (average number hours per student)} \times 16 \text{ (number weeks in semester)}}{3 \times 16 \text{ (number of weeks in semester)}} = \frac{16}{48} = .33 \text{ Headcount Contact Hours}$$

Course Description: Provide a brief narrative description of the course content. Attach a course syllabus and outline of major topics, readings and grading criteria.

Mark All That Apply: Mark 'yes' or 'no' if a course is to be rotating topic, S/U grading only or is repeatable for credit.

Prerequisites: Indicate prefix and number or content of courses and other requirements that must be satisfied prior to enrollment in this course.

Corequisites: Indicate prefix and number or content of courses and other requirements that must be taken concurrently with this course.

Faculty Credentials: Indicate yes or no if the faculty teaching this course have completed at least 18 graduate semester hours in the teaching discipline and hold at least a master's degree.

Degree Type: Check all appropriate categories. For category of "Other," describe the intended registrants, e.g., law enforcement officers, registered nurses, retail merchants, etc.

Category of Instruction: Introductory courses are those that require no prerequisites and are general in nature. Intermediate courses require some prior preparation in a related area. Advanced courses require specific competencies or knowledge relevant to the topic prior to enrollment.

Department Contact and Telephone Number: Name, phone and PO Box number.

College Contact and Telephone Number: Name, phone and PO Box number.

Approvals:

Submit the completed form using the online tracking system at approval.ufl.edu. Appropriate approvals and notifications will be made through the online tracking system.

Department Chair

College Dean: Approval of the college-level curriculum committee or, if no such committee exists, approval of the college.

Graduate Dean: All graduate level courses must be approved by the Graduate Curriculum Committee.

Do Not Complete Part II.

Should you have questions concerning the completion of this form, please call the Office of the University Registrar at 352-392-1374, ext. 7237. Call the Graduate School at 352-392-1282 for questions concerning graduate courses. Questions concerning the online system should be emailed to approval@ufl.edu.



**UNIVERSITY OF
FLORIDA**

HOUGH GRADUATE SCHOOL OF BUSINESS

**WARRINGTON COLLEGE
OF BUSINESS ADMINISTRATION**

P2MBAS09

**TERM 4
1/13/08 TO 5/3/08**

**FIN 6559
PERSONAL FINANCIAL MANAGEMENT**

**David J. Nye, PhD, MBA
Professor of Finance and Insurance**

PERSPECTIVE

Personal financial planning is growing in complexity, as is its importance to one's long-term financial success. The scope and size of benefits under government programs is constrained for the foreseeable future. Benefit programs at corporations are carefully scrutinized for cost control purposes in order to preserve or enhance the entities' competitive situation. For example, employees more frequently have a fixed benefit budget to "spend" on a menu of financial services products, so informed decision making is important. Also, the shift from defined benefit pension plans to defined contribution plans represents one of the largest risk transfers from the organization to the individual. As a result, employees have had thrust upon them the job of 'personal professional pension fund manager' and virtually all of them are unprepared to carry out the administrative, actuarial and investment duties involved in this position.

Simultaneously, the variety and sophistication of insurance and financial products has increased dramatically. These developments have taken place against the backdrop of a tax code that, despite politician's promises to simplify it, has grown increasingly arcane. Thus, effective personal financial planning is both timely and necessary.

GOAL

The goal of the Personal Financial Management module is to provide instruction in how to accumulate and preserve personal wealth. Due to time constraints, it is not possible to examine all subject areas in depth. However, based upon previous class results I am confident that all of you will receive at least one good financial planning idea from this class.

There are six specific goals for this course: 1) demonstrate how to get organized in the planning process through using comprehensive planning software, 2) illustrate the use of sophisticated financial modeling tools, 3) examine the effects of taxes and expenses on wealth accumulation, 4) learn the importance of asset allocation and asset location decisions, 5) study the fundamentals of risk and insurance management, and 6) summarize the course by learning the most important personal financial management decisions.

FORMAT

The primary instructional format will be lectures supplemented by assignments that involve an application of the topics discussed to a given personal financial situation.

We do not have a textbook for this course. The material is drawn from a number of different sources and selected references are provided below as well as in the lecture modules. Hard copies of the slides are available for your current and future use.

GRADING

All assigned readings are the responsibility of each class member. Your course grade will be determined by the results of quizzes based upon these readings (this will be an individual grade) and timely and appropriate completion of the assignment using MoneyTree TPS software (this will be a team grade). Late reports received within one day of the due date will incur a 50 percent penalty. Reports received more than one day after the due date will not be accepted. Additional details about the MoneyTree assignments are provided in the next section.

ASSIGNMENTS

Total Planning System (TPS)¹ is a comprehensive personal financial planning software package that, among other things, incorporates Monte Carlo simulation to develop advanced financial projections. There are two phases to the TPS assignment. First, data supplied by me will be entered into the software.^{2,3} Second, several reports will be produced as specified in the ASSIGNMENT SCHEDULE.

Hypothetical data will be entered into the software and it will generate the report needed for you to complete each assignment. For every section in which a report is assigned for analysis, each team will identify the problems it discovered based upon a review of the software output. The problem identification will be followed by a description of a proposed action(s) to fix the problems. The report will consist of two parts. First, a one page to two page discussion and analysis, e.g., insufficient projected capital to fund an individual's retirement. Second, the Team will provide an explanation of how the problems can be solved. Appended to the Team's discussion and analysis will be screen captures as needed of the relevant page of the TPS report that demonstrates the problems identified.⁴ Finally, a screen capture will be appended that demonstrates the problems have been satisfactorily addressed.⁵ Note: Your report should be a single document (as opposed to a Word document with attachments).

Report Work Product

The analysis contained in the various reports that are submitted should be an in-depth study of the issue. Brief, superficial analyses indicate a lack of effort and will be graded accordingly. Each team's report should be of "professional grade". Prior to each assignment due date, I will email the data set to be used in preparing the report. Included with the file will be a listing of the subject areas that, as a minimum, should be covered in the team's report.

¹ I don't know if the MoneyTree programmers had seen the movie "Office Space" when they created "TPS".

² Instructions for downloading TPS are included at the end of this syllabus.

³ I believe many of you will wish to use TPS for your personal financial situation and I encourage you to do this.

⁴ A screen capture is done as follows. Hold down "Ctrl" and press "Print Screen" – this will capture the image on your computer screen. Next, open Word, hold down "Ctrl" and press the letter "V" on your keyboard.

⁵ I recommend you retain a copy of the original data set. This can be done by exporting the original data set to a separate folder (i.e., one which is not automatically used by TPS).

DISCUSSION OUTLINE

TOPIC	ACTIVITY
A. INTRODUCTION Financial Services Surveys Elements of a Financial Plan	Readings for Introduction <ol style="list-style-type: none"> 1. A Home Can Be a House of Mirrors 2. Five Steps to an Organized Financial Life 3. Nine Questions Partners Should Ask Each Other Before Getting Married. (These are good questions even if you're already married!)
B. U.S. TAX SETTING Income Taxes Estate and Gift Taxes	Readings for U.S. Tax Setting General <ol style="list-style-type: none"> 1. Is America Going Broke? 2. The Taxpaying Minority Income Taxes <ol style="list-style-type: none"> 1. A Tax Saving Move For Seniors 2. Income Limits Effectively Eliminated 3. Introducing the Roth 401(K) 4. Taxes When You Sell Your Home 5. What To Do With Appreciated Assets Education Accounts <ol style="list-style-type: none"> 1. Choosing a 529 College-Savings Plan: When It Makes Sense to Go Out of State 2. The Best and Worst 529 College Savings Plans 3. The New Gold Standard Among 529 College Savings Plans
C. WEALTH ACCUMULATION Setting Financial Goals Concepts in Risk and Return	Readings for Setting Financial Goals <ol style="list-style-type: none"> 1. Are You Saving Enough 2. Counting on Getting an Inheritance? Better Make Other Retirement Plans 3. Don't Save Too Much for Retirement 4. Simple Math to See if You Have An Age-Appropriate Nest Egg 5. Will You Be Able to Retire

Investment Information/Advisors	<p>Reading:</p> <ol style="list-style-type: none"> 1. Finding an Index-Fund Genius 2. Five Key Rules To Heed Before Hiring a Financial Adviser 3. When to Shop Around for Advice
Drags on Wealth Accumulation	<p>Readings for Drags On Wealth Accumulation</p> <ol style="list-style-type: none"> 1. Buffet: Cut Your Gains 2. What Is Your 401(k) Costing You? 3. Yield Chase: Boost Income By Slashing Investment Costs
Tax Reduction Products and Strategies	<p>Readings for Tax Reduction Products:</p> <ol style="list-style-type: none"> 1. A New Flavor For Retirement: It's Called a Roth 401(k) Plan, And It May Be Better for Some, Like Younger Workers, Parents. 2. The Best Investment For Your IRA 3. Trimming Your Taxes: Why Roth 401(k)s Often Beat Conventional 401(k) Plans
Portfolio Management	<p>Readings for Portfolio Management</p> <ol style="list-style-type: none"> 1. E*Trade Risk Assessment Tool 2. Fine Tuning Your Asset allocation. 3. Professors Shine a Light Into Closet Indexes 4. The Ultimate Buy and Hold Strategy.
Behavioral Finance	<p>Readings for Behavioral Finance</p> <ol style="list-style-type: none"> 1. Five Mistakes Investors Just Cannot Afford
Performance Measurement	

- Property Exposure
- Personal Exposures
- Techniques for Managing Exposures
- Asset Protection Techniques/Products

Auto Insurance

Health and Disability Insurance

Annuities

1. A Fortress For Your Money
2. Beyond the Prenup

1. 10 Things You Need to Know About Homeowners Insurance
2. Time to Review Your Homeowners Policy
3. Ways To Save On Title Insurance
4. Who Needs a Flood Policy

Readings for Life Insurance

- Assess whether your life insurance is appropriate in terms of the type of insurance. Do not submit this assessment.

1. Annuities Lighten Up
2. Money for Life: The Hidden Costs (10/07)
3. New Vanguard Funds aim to Lure Retirees (10/07)
4. Reducing the Risk of Variable Annuities: Sales of Retirement Investments Surge as Purveyors Add New Guarantees on Returns, but Fees Are Even Higher
5. Secondary Market for Annuities Expands

<p>Risk Management Rules</p> <p>Insurance Suppliers</p>	<ol style="list-style-type: none"> 6. The Right Time to Start Drawing Social Security Benefits 7. Tools For Deciding How Much To Spend in Retirement <p>Answering questions as objectively as you can, determine your life expectancy at http://www.msnbc.com/modules/quizzes/longevity.asp</p> <p>Use feasible changes in your responses to the questions at the web site to measure how much you can increase your life expectancy. Do not submit this work.</p>
<p>E. CAPSTONE SUMMARY The "Really Big" Personal Money Decisions</p>	

ASSIGNMENT SCHEDULE

On the date shown in the table below, please submit the indicated TPS report.

Class Meeting Date	Assignment	
	Description	Due Date
January 13	<p>Download the MoneyTree TPS software and install it on a computer. Create one Data file per team by entering the Chipotle data file and run a scenario.</p> <p>NOTE: You will need to use the software for about 4 months but a student license is limited to 90 days. Therefore, rotate the download among the team members to assure access to the TPS software throughout the term.</p>	Do not submit this report. It is simply for you to become familiar with the software. You could also enter your personal data and run a scenario.
February 9	Produce the TPS “Income Tax” report using the Dunkin data file. Prepare your analysis following the format described in the section entitled ASSIGNMENTS .	<p>At the start of class.</p> <p>Quiz 1 based upon the readings from Parts A and B.</p>
March 8	Produce the TPS “Retirement” and “Investment” TPS reports using the Emiliano data file. Prepare your analysis following the format described in the section entitled ASSIGNMENTS . Note: this will be a single report covering both topics.	At the start of class.

April 5	Produce the TPS “Insurance” report using the FastEddie data file. Prepare your analysis following the format described in the section entitled ASSIGNMENTS .	At the start of class. Quiz 2 based upon the readings from Part C.
May 3		Quiz 3 based upon the readings from Part D.

RECOMMENDED REFERENCE BOOKS:

Bodie, Kane and Marcus, Essentials of Investments, 6th Edition, 2007, McGraw Hill/Irwin

Gitman, Lawrence J. and Michael D. Joehnk, Fundamentals of Investing, 9th Edition, Harper Collins College Publishers, 2005, New York, N.Y.,

Madura, Personal Finance, 3rd Edition, Addison Wesley, 2007 (Buy the edition that has an accompanying workbook and cd).

Rejda, George E., Principles of Risk Management and Insurance, 9th Edition, Addison-Wesley Educational Publishers, Inc., 2005, New York, N.Y.

Kotlikoff, Laurence J. and Scott Burns, The Coming Generational Storm : What You Need to Know about America's Economic Future

Total Planning System by Money Tree

Download and Installation

Go to <http://www.moneytree.com/> to begin the download process. Click on “Free Trial” and enter your first and last name as requested. **In the “Title” field enter “Student” and in the “Company” field enter “University of Florida”.** The latter two entries must be made this way for Money Tree to properly manage their database and for you to avoid being called by their sales personnel. Enter the remaining information; enter “Personal Referral” for how you heard about Money Tree and leave “Broker/Dealer name” blank. For “Product Interest” click “TOTAL Planning System” and then click on “Submit information and continue to download”. The next page will display **TOTAL Planning System (Version x.x): Download Now!** and you should click on this link. Select “Save” and the file download will begin.

YOU NOW HAVE 90 DAYS TO USE THIS SOFTWARE. IN ORDER TO EXTEND THIS PERIOD, ANOTHER MEMBER OF YOUR TEAM WILL HAVE TO DOWNLOAD A COPY OF THE SOFTWARE MIDWAY THROUGH THE SEMSTER.

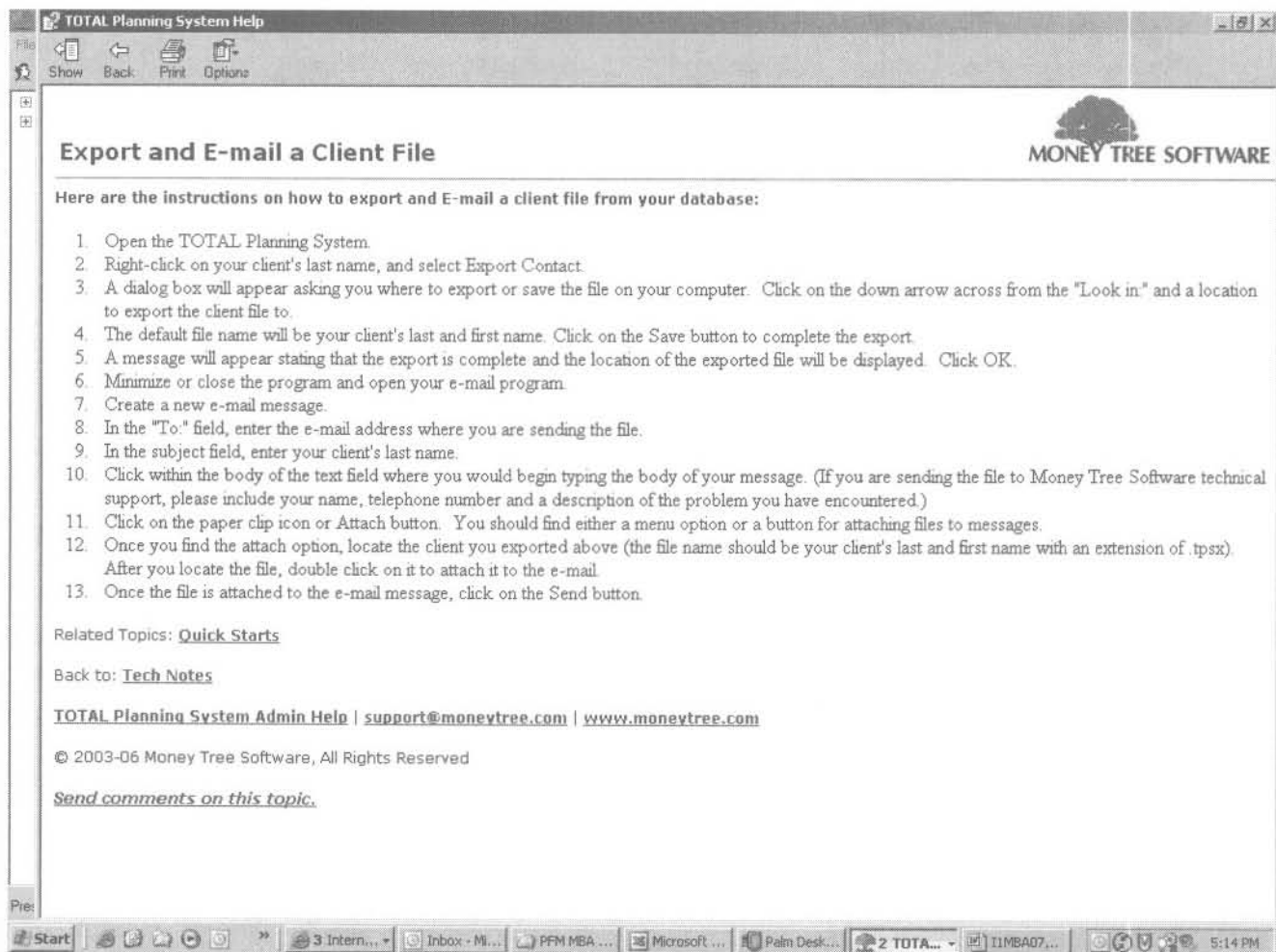
Entering Data

Open the software and click on “New Contact”. Select “Use the Quick Entry Wizard to enter the new contact.” A sequence of 13 screens will then appear and the data supplied by me will be entered in the appropriate areas of the screen.

Upon completion of the data entry steps, I recommend that a copy of the data file be exported to each team member. How to export and email the Data file is explained next.

Export and E-Mail a Data File

After you have completed data entry, the screen below shows how to do export a data file. If you wish to replicate these instructions, use the Help function in the program.



The screenshot shows a Windows-style window titled "TOTAL Planning System Help". The window has a menu bar with "File" and a toolbar with "Show", "Back", "Print", and "Options". The main content area has a title bar "Export and E-mail a Client File" and the "MONEY TREE SOFTWARE" logo in the top right. The text inside the window provides instructions on how to export and email a client file from the database. At the bottom of the window, there is a taskbar with various icons and a system clock showing 5:14 PM.

Export and E-mail a Client File

Here are the instructions on how to export and E-mail a client file from your database:

1. Open the TOTAL Planning System.
2. Right-click on your client's last name, and select Export Contact.
3. A dialog box will appear asking you where to export or save the file on your computer. Click on the down arrow across from the "Look in:" and a location to export the client file to.
4. The default file name will be your client's last and first name. Click on the Save button to complete the export.
5. A message will appear stating that the export is complete and the location of the exported file will be displayed. Click OK.
6. Minimize or close the program and open your e-mail program.
7. Create a new e-mail message.
8. In the "To:" field, enter the e-mail address where you are sending the file.
9. In the subject field, enter your client's last name.
10. Click within the body of the text field where you would begin typing the body of your message. (If you are sending the file to Money Tree Software technical support, please include your name, telephone number and a description of the problem you have encountered.)
11. Click on the paper clip icon or Attach button. You should find either a menu option or a button for attaching files to messages.
12. Once you find the attach option, locate the client you exported above (the file name should be your client's last and first name with an extension of .tpsx). After you locate the file, double click on it to attach it to the e-mail.
13. Once the file is attached to the e-mail message, click on the Send button.

Related Topics: [Quick Starts](#)

Back to: [Tech Notes](#)

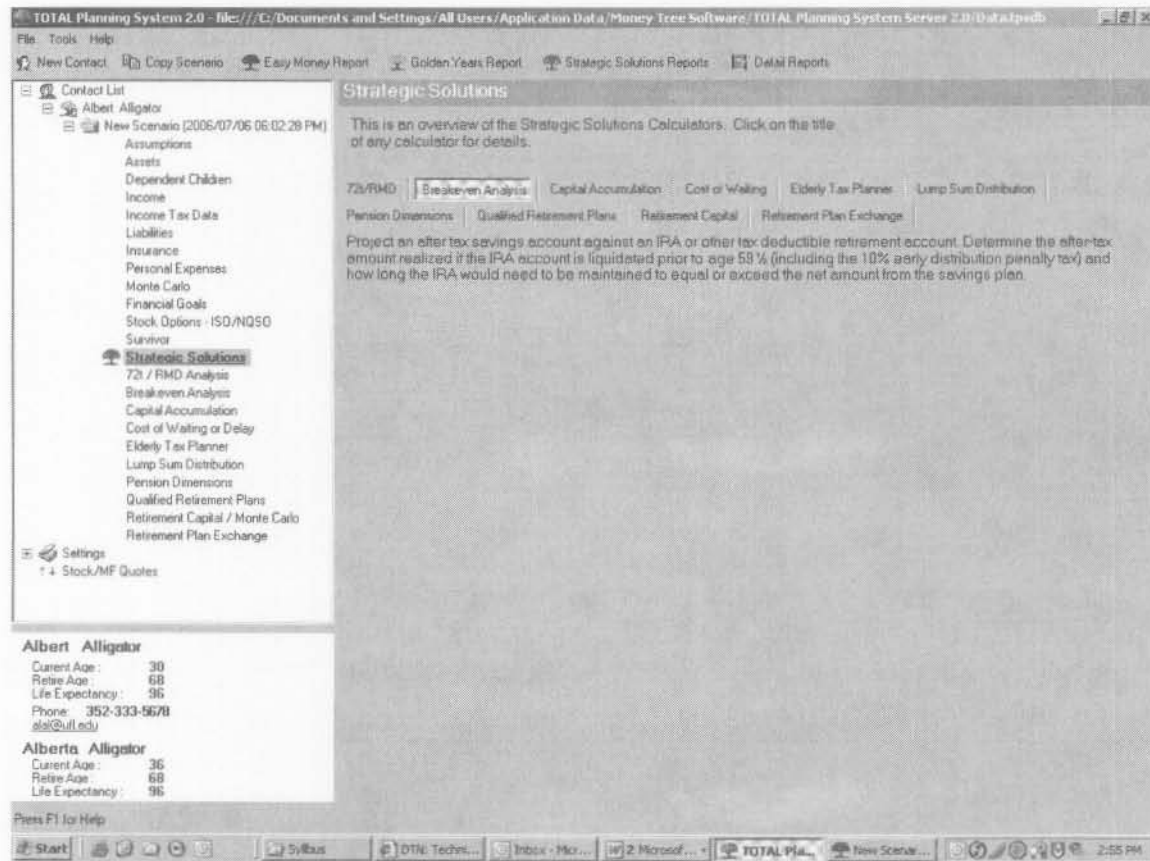
[TOTAL Planning System Admin Help](#) | support@moneytree.com | www.moneytree.com

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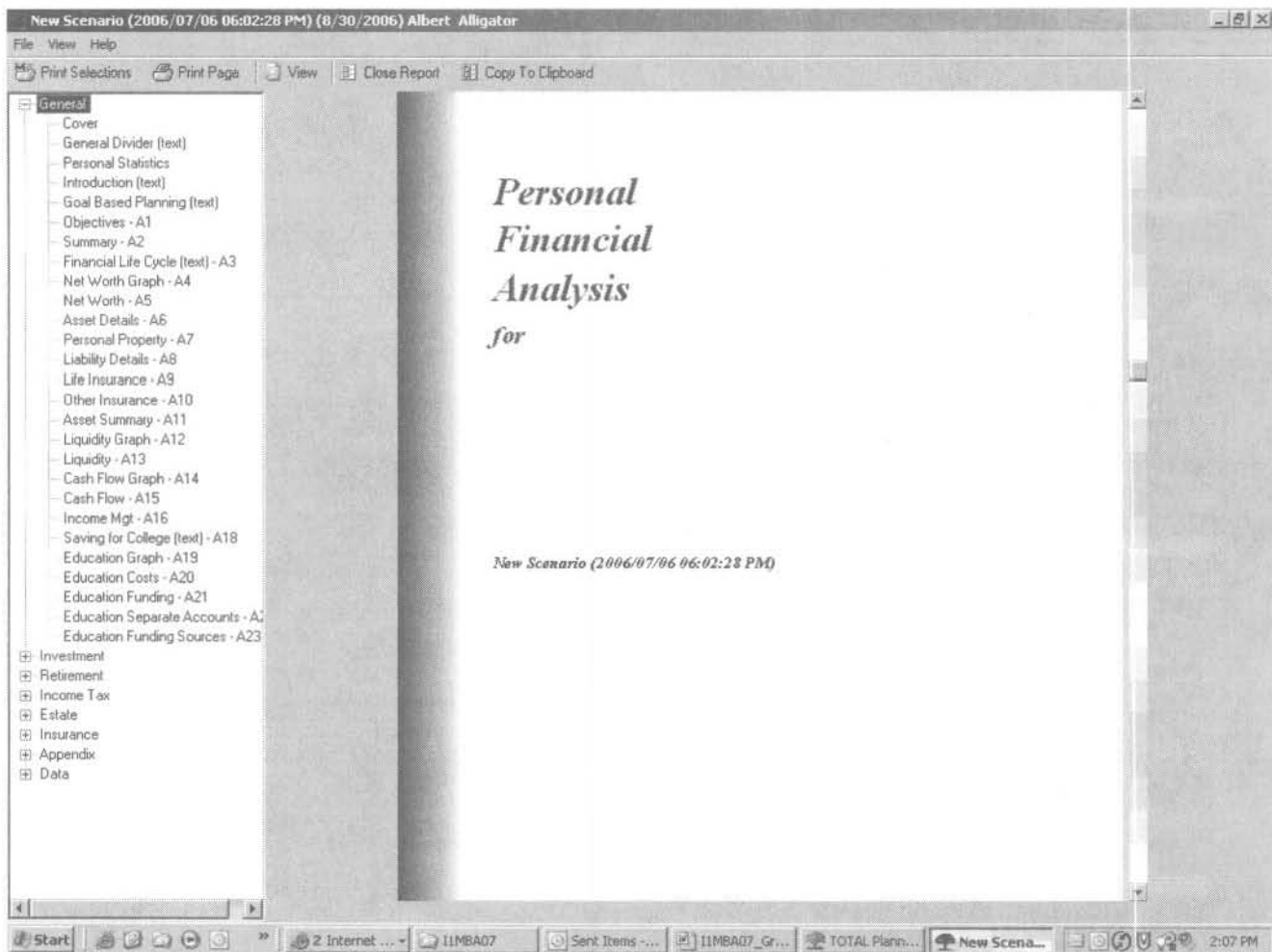
[Send comments on this topic.](#)

Creating Reports

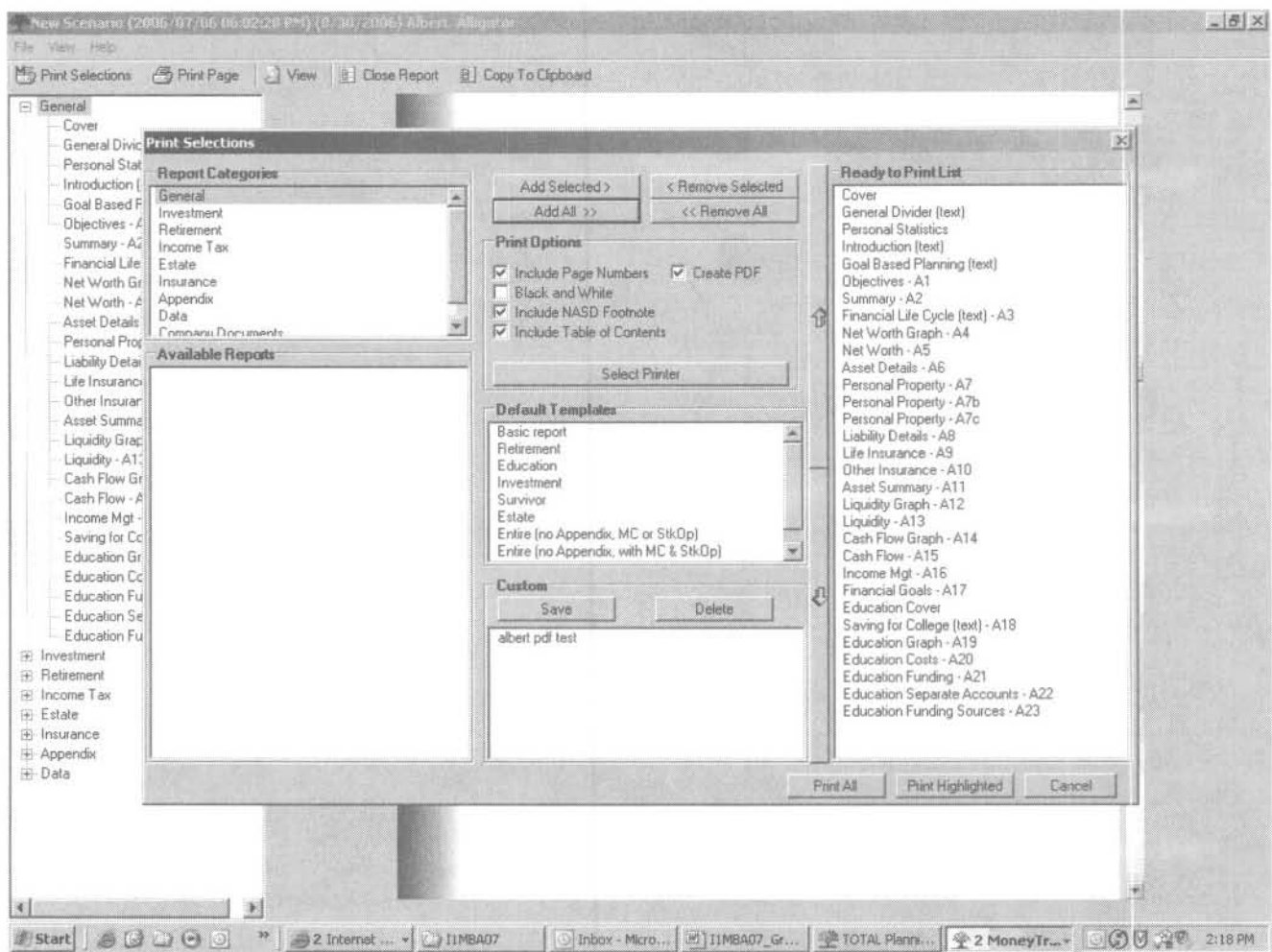
After opening a Data file, the screen has displayed on it the phrase “Strategic Solutions”. Double-click on this phrase and this will “light up” across the top of the screen the various report options available. These are shown in the screen below.



Click on “Easy Money Report” and, after a few moments, all of the reports that you will need to complete the course assignment will have been generated. An example of this screen is shown next.



In this case, the “General” report selection has been expanded to show the various components of the “General” report. Click on “Print Selections” and highlight “General” in the resulting screen. Then click on “Add All”. Under “Print Options” check mark the boxes shown in the screen on the next page.



The items shown in the “Ready to Print List” on the right hand side of the screen will be included in the report.

B. U. S. Tax Setting

C. Wealth Accumulation

D. Risk Management and Insurance

E. Capstone Summary

F. Getting Organized

Class Feedback On Personal Financial Management

Date of Class Meeting: ____/____/____

Please circle the appropriate category for items A. through E. and make any comments you believe may help to make this seminar more valuable to our students.

- | | | | |
|----------------------------|----------------|-------------|-------------------|
| A. Pace of Class: | Too fast | About right | Too slow |
| B. Content: | Quite relevant | Relevant | Not useful |
| C. Presentation: | Effective | Average | Needs improvement |
| D. Class Involvement: | Too much | About right | Not enough |
| E. Difficulty of Material: | Too difficult | About right | Not difficult |

F. I would like more discussion on _____

G. I would like less discussion on _____

H. Other Comments and Suggestions: _____

Thank you for your feedback!

GLOBAL ENTREPRENEURSHIP

GEB 6642 – SECTION 7238

INSTRUCTOR: John Kraft, Dean
Bryan Hall Room 100
(352) 392-2398
john.kraft@cba.ufl.edu

Class Hours: Monday & Wednesday 8:00 a.m. – 9:15 a.m.
Office Hours: Monday & Wednesday 9:15 a.m. – 10:00 a.m.
Location: Stuzin 103

COURSE DESCRIPTION:

This course deals with the international entrepreneurship from the perspective of the firm and entrepreneurial managers operating in an international environment. International entrepreneurship is the intersection of entrepreneurship, international business, and strategy. The objective of the course is to provide students with a fundamental knowledge of the theory and application of global entrepreneurship. The course is designed to assist participants in:

1. Learning about the impact on entrepreneurial firms in a global environment.
2. Applying concepts and techniques to entrepreneurs in global business.
3. Working as a management team on problems facing entrepreneurs in global markets.

TEXT:

- Charles Hill, Global Business Today, 5th edition, McGraw Hill Irwin, 2008 (CH).
- Course pack at Target Copy (CP)

CASES:

Each team will be asked to provide a written response to assigned questions for two assigned (team) cases. The questions are at the end of this syllabus. The papers should focus on the answers to the questions. The papers should be no longer than three to four pages (each case is 5 points). All assignments are due at the start of class on the assigned date. Students will be grouped into teams of four to six. For each case, write the question and the answer. Bullet points are acceptable answers.

RESEARCH TASKS:

Each team will complete one research task. The assignment is in the Hill book. The paper should be five to six pages. The task will be completed as a team (10 points each).

TESTS:

Test 1 will cover topics Chapters 1, 2, 3, 6, 7 and 8 (30 points)
Test 2 will cover topics Chapters 9, 11, 12, 13, 14, 15 (30 points)

GLOBAL ENTREPRENEURSHIP

GEB 6642 – SECTION 7238

COUNTRY REPORT:

You are an entrepreneur located in Iceland and you have developed a wind turbine system for the generation of electricity. Your competitive advantage is based on new blade and gear box design. Your team's challenge is to determine where to produce the product and which countries present the best market opportunity for your product. Given the market size of Iceland, you are a "born global" company. Your team must analyze the attractiveness of several country locations as potential markets given political, legal, and economic risks. You must also determine the potential market for your product given market factors and other competitors (GE, Siemens, Vestas, Suzlon, Gamesa, etc.).

Each team will pick a country and develop a country report which focuses on the political economy of the country. The report is limited to ten pages and must discuss the political, social, legal, and economic system of the chosen country. Identify economic, social, political, and legal risks in doing business in the country. The report is designed to provide information to an entrepreneurial company seeking to enter a country or an opportunity to start a new company within the country (10 points). Paper must conclude with an assessment of the potential to do business in the chosen country. Reference sources must be included at the end of the report. Each team will give an eight to ten minute class presentation. The paper will be graded based on content, analysis, conclusions, and references. Presentations should last ten minutes on average.

FORMATTING:

Margins: 1 inch margins all around
Font: Times New Roman or Arial
Font Size: 11 or 12
Spacing: 1.5

REFERENCES:

Students can use APA Style for their references (optional). Examples can be found on the link below:
<http://owl.english.purdue.edu/workshops/hypertext/apa/parts/references.html>

ASSIGNMENTS:

Bring a hard copy of all assignments to class. If you are not attending class, all assignments must be emailed to instructor prior to start of class on the assigned due date.

CLASS PARTICIPATION:

All students are expected to attend class and participate in case discussions and in-class exercises. I will call on students randomly so be aware of this. Materials will come from text – (CH) and (LD).

GRADING:

Research Tasks (1)	10
Country Report & Presentation (1)	20
Team Cases (2)	10
Test 1	30
Test 2	30
	<hr/>
	100 points

GLOBAL ENTREPRENEURSHIP

GEB 6642 – SECTION 7238

EVALUATION:

Students will be asked to participate in numerous evaluations of the class, course materials, cases, the course components as well as the instructor and their classmates. None of these evaluations will be used in the course grading; they are used to improve the course and classroom experience.

GROUND RULES:

1. The country reports and research reports are designed to develop your understanding of the political economy (social, political, economic, and legal system) of the country you choose.
2. All information must be supported by references and notes.
3. The country reports will be presented in class.

SCHEDULE AND ASSIGNMENTS:

January 5, 2009

- Review of course outline
- Explanation of course structure
- Discussion of course assignments
- Chapter questions
- Class participation
- Case assignments
- Form teams
- Film: Cirque du Soleil
- Chapter 1 (CH)
- Howard H. Stevenson and David E. Gumpert - The Heart of Entrepreneurship (CP)

Assignments due January 7, 2009 – Cross Culture

- Chapter 2 (CH)
- Film: Borders
- Walter Kuemmerle – A Test for the Fainthearted (CP)

Assignments due January 12, 2009 – Cross Culture

- Chapter 3 (CH)
- Case – (CH) Indonesia the Troubled Giant p. 84, #1, #2, #3, #4 (team)
- Candida G. Brush - Pioneering Strategies for Entrepreneurial Success (CP)

Assignments due January 14, 2009 – Global Trade

- Chapter 6 (CH)
- Film: India
- Nancy J. Adler – Women in International Entrepreneurship (CP)
- Laurel J. Delaney – The New Globetrotters (CP)

GLOBAL ENTREPRENEURSHIP GEB 6642 – SECTION 7238

Assignments due January 19, 2009 – Foreign Direct Investment

- Chapter 7 (CH)
- Film: China Rising
- Turn in country choice for country report

Assignments due January 21, 2009 – Regional Integration and Finance

- Chapter 8, 9 (CH)
- Film: Yuan /Dollar
- Research Report: Research Task #2 p. 187 (CH) (team)

Assignments due January 26, 2009 – Strategy

- Chapter 11 (CH)
- Patricia P. McDougall – International Versus Domestic Entrepreneurship (CP)
- Case – (CH – Rising Euro Hammers Auto Parts Manufacturing p. 323, #1, #2, #3, #4 (team)

Assignments due January 28, 2009 – Strategy and Entry

- Chapter 12 (CH)
- Film: Three Billion Capitalists
- Benjamin M. Oviatt and Patricia Phillips McDougall – Toward a Theory of International New Ventures (CP)

Assignments due February 2, 2009

- Test #1 – Chapters 1, 2, 3, 6, 7, 8

Assignments due February 4, 2009 – Exporting

- Chapter 13 (CH)
- Film: Dominos
- Terence Fan and Phillip Phan – International New Ventures (CP)

Assignments due February 9, 2009 – Logistics

- Chapter 14 (CH)
- Film: Cretors
- Walter Kuemmerle – The Entrepreneur's Path to Global Expansion (CP)

Assignments due February 11, 2009 – Marketing

- Chapter 15 (CH)
- Film: Starbucks
- Benjamin M. Oviatt and Patricia Phillips McDougall – Defining International Entrepreneurship and Modeling the Speed of Internationalization (CP)
- Country Report Due

**GLOBAL ENTREPRENEURSHIP
GEB 6642 – SECTION 7238**

Assignments due February 16, 2009 – Presentation

- Country Report Presentation

Assignments due February 18, 2009

- Test #2 – Chapters 9, 11, 12, 13, 14, 15

Note: No assignment will be accepted after February 18, 2009

PART 1: TO BE COMPLETED BY THE INSTITUTION

Institution: University of Florida	Institutional Code: 001535	Instructional Unit or Department Name, Department Code: Information Systems and Operations Management-011707000
Current SCNS Course Identification: Discipline (SMA) _____ Prefix <u>I</u> <u>S</u> <u>M</u> Level <u>6</u> Course Number <u>2</u> <u>3</u> <u>6</u> Lab Code _____ Institution's Course Title: <u>Business Objects I</u>		

PART 2: REQUESTED ACTIONS

Terminate Current Course	<input type="checkbox"/> Yes	Date Termination Effective: _____
NEW SCNS Course Identification: (Complete all appropriate areas) NEW Discipline (SMA) _____ Prefix _____ Level _____ Course Number _____ Lab Code _____ NEW Institution Course Title (if applicable): _____		
EFFECTIVE TERM AND YEAR FOR CHANGES: <u>Spring 2010</u>		

Other Items to Change	Change From	Change To
Amount of Credit		
Contact Hour Base or Head Count		
Prerequisites/Corequisites (This form does not update ISIS or registration prerequisite checking.)	ISM 6216, ISM 6223 and ISM 6258	ISM 6215, ISM 6222 and ISM 6259
Change of Course Description (Course syllabus must be attached):		Mark any changes that apply: Rotating Topic <input type="checkbox"/> yes <input type="checkbox"/> no S/U Only <input type="checkbox"/> yes <input type="checkbox"/> no Repeatable for Credit <input type="checkbox"/> yes <input type="checkbox"/> no

Department Contact, Telephone Number, Email Address and PO Box: Pat Brawner, 846-1374, brawner@ufl.edu, PO 117169	(Date)
College Contact, Telephone Number, Email Address and PO Box: Sharon Haughton, 273-3225, sharon.haughton@cba.ufl.edu, PO 117150	(Date)

PART 3: TO BE COMPLETED BY THE FACULTY DISCIPLINE COMMITTEE REPRESENTATIVE

Approved Course Classification (Prefix, Number, Lab Code): _____
If not the same as recommended by institution, please explain:

SCNS Course Title (if new): _____
Decade Title (if new): _____
Century Title (if new): _____
Signature, Faculty Discipline Committee Representative _____ Date _____

COURSE TERMINATION OR CHANGE TRANSMITTAL FORM ♦ INSTRUCTIONS FOR COMPLETION OF PARTS 1 & 2

The Course Termination or Change Transmittal form is used for transmitting the following course information to the Statewide Course Numbering System (SCNS):

1. Prefixes and numbers of courses which will no longer be offered by the institution.
2. Additional course information to be recorded in the SCNS inventory.
3. Supporting documentation for review by the Faculty Discipline Coordinator for possible reassignment of prefix and course number.

[NOTE: Major revisions in course content will require a new course number assignment. Please terminate the current course and add the new course.]

All information requested on this form is necessary for the efficient and timely maintenance of the SCNS inventory. Thus, all items on Part I must be completed before it is forwarded to the Florida Department of Education (DOE). An updated course syllabus must be attached in cases where course content has changed or a new prefix or number is requested.

Part 1

The following instructions and definitions are provided to clarify items to be completed on the Course Termination or Change Transmittal form.

Instructional Unit or Department Name/Department Code: Academic unit and code number of department responsible for teaching the course. Use the complete name, not abbreviations or acronyms.

Current SCNS Course Identification:

Discipline (SMA): A three-digit code representing a broad Subject Matter Area. This code can be obtained from the SCNS handbook.

Prefix: A three-letter code indicating placement of a course within the discipline.

Level: A one-digit code preceding the course number which indicates the level (e.g., freshman, sophomore, etc.) at which the course is to be taught. This number is to be recommended by the institution according to state and institutional policy.

Course Number: A three-digit code indicating the specific content of the course based on the SCNS taxonomy and course equivalency profiles.

Lab Code: This code is left blank if the course is a lecture course (has no laboratory component). The letter "C" may be used to indicate a combination of lecture and laboratory. An "L" indicates a laboratory course for which there may or may not be an associated lecture course. The "L" may also be used for a course which is laboratory only.

Contact Hours: "Base" contact hours are determined by dividing the total number of classroom meeting hours per semester by the number of weeks in the semester. For example:

$$\frac{8 \text{ (hours class meets per week)} \times 4 \text{ (number of weeks class meets)}}{16 \text{ (number of weeks in semester)}} = \frac{32}{16} = 2 \text{ Base Contact Hours}$$

"Headcount" contact hours are determined by dividing the average number of hours the instructor meets with one student during the semester by 3 times the number of weeks in the semester. For example,

$$\frac{1 \text{ (average number hours per student)} \times 16 \text{ (number weeks in semester)}}{3 \times 16 \text{ (number of weeks in semester)}} = \frac{16}{48} = .33 \text{ Headcount Contact Hours}$$

Institution's Course Title: The title of the course as it currently appears in the catalog.

Part 2 Requested Actions

Terminate Current Course, Effective Date: Check the "yes" box if the course is to be terminated and enter the effective term and year after which the course will no longer be offered.

Course Change Information: If changes are to be made in a course's identification, list changes only. All changes may affect the course prefix and number. All changes are subject to approval of the appropriate Faculty Discipline Coordinator based on the SCNS taxonomy and classification system.

Change of Course Description: Provide a brief narrative description of the content of the course as it will appear in the catalog. A course syllabus including a course outline of major topics must be attached for changes to courses and changes to course content.

Effective Term: Provide term and year in which the change or termination will be first effective.

Prerequisites/Corequisites: Indicate prefix and number or content of courses and other requirements that must be satisfied prior to enrollment in this course or concurrently with this course.

Change Course Title: Provide the title of the course as it will appear in the catalog.

Mark any changes to status: Mark 'yes' or 'no' if changing a course to/from Rotating Topic, S/U Grading Only or Repeatable for credit.

Department Contact: Name, phone and PO Box number.

College Contact and Telephone Number: Name, phone and PO Box number.

Approvals:

Submit completed form using the online tracking system to approval.ufl.edu. Appropriate approvals and notifications will be made through the online tracking system. Signature and date indicating approval of the college-level curriculum committee or, if no such committee exists, approval of the college.

Department Chair

College Dean: Approval of the college-level curriculum committee or, if none exists, approval of the college.

Graduate Dean: All graduate level courses must be approved by the Graduate Curriculum Committee.

Do Not Complete Part II.

Should you have questions concerning the completion of this form, call the Office of the University Registrar at 392-1374, ext. 7237. Call the Graduate School at 352-392-1282 for questions concerning graduate courses. Questions concerning operation of the online system should be emailed to approval@ufl.edu.

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PART 2: REQUESTED ACTIONS

Terminate Current Course	<input type="checkbox"/> Yes	Date Termination Effective: _____
NEW SCNS Course Identification: (Complete all appropriate areas) NEW Discipline (SMA) _____ Prefix _____ Level _____ Course Number _____ Lab Code _____ NEW Institution Course Title (if applicable): _____		
EFFECTIVE TERM AND YEAR FOR CHANGES: <u>Spring 2010</u>		

Other Items to Change	Change From	Change To
Amount of Credit		
Contact Hour Base or Head Count		
Prerequisites/Corequisites (This form does not update ISIS or registration prerequisite checking.)		QMB 6755
Change of Course Description (Course syllabus must be attached):		Mark any changes that apply: Rotating Topic <input type="checkbox"/> yes <input type="checkbox"/> no S/U Only <input type="checkbox"/> yes <input type="checkbox"/> no Repeatable for Credit <input type="checkbox"/> yes <input type="checkbox"/> no

Department Contact, Telephone Number, Email Address and PO Box:	(Date)
Pat Brawner, 846-1374, brawner@ufl.edu, PO 117169	
College Contact, Telephone Number, Email Address and PO Box:	(Date)
Sharon Haughton, 273-3225, sharon.haughton@cba.ufl.edu, PO 117150	

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