

BUSINESS: FINANCE, INVESTMENT, AND BANKING, BBA

The finance, investment, and banking (<https://business.wisc.edu/undergraduate/majors/finance-investment-banking/>) curriculum prepares students for a wide variety of career pathways including corporate finance, the investments and securities industry, the management of financial institutions including banks and insurance companies, and the evolving financial technology sector. The theory of finance and its applications are emphasized. Students learn about security analysis and valuation, security trading, financial markets and government policies, financial forecasting, capital structure, financial risk management, venture capital, security issuance, international finance, and financial technology.

A significant part of the coursework teaches students to understand risk and uncertainty, both at an intuitive level and at a technical level. More important, students learn to construct models of financial decisions—e.g., an investor's portfolio choice problem, the issuance of securities by corporations, and the structure of financial investments by banks.

RELATED STUDENT ORGANIZATIONS

Capital Management Club (<https://www.cmc-uwmadison.com/>)
 Fantasy Sports & Finance Club (<https://win.wisc.edu/organization/fsf/>)
 Finance & Investment Society (<https://win.wisc.edu/organization/fisw/>)
 Forex and Investment Club (<https://win.wisc.edu/organization/forexclub/>)
 Investment Banking Club (<https://www.wiscibc.com/>)
 Sales & Trading and Asset Management Society (<https://www.stamwisconsin.com/>)
 Society of Personal Investments (<https://win.wisc.edu/organization/SPI/>)
 Wealth Management Group (<https://www.badgerwmg.org/>)
 Women in Finance and Accounting (<https://win.wisc.edu/organization/WIFA/>)

HOW TO GET IN

Students wishing to pursue this major must be admitted to the School of Business. Once admitted, students are able to pursue any business major they choose. To find out more about the school's admissions process for undergraduate students, please see *Entering the School* (<http://guide.wisc.edu/undergraduate/business/#enteringtheschooltext>).

While not required for declaration, students are encouraged to enroll in these courses in preparation for the major as they serve as a foundation for enrollment in subsequent courses.

Code	Title	Credits
Business Analytics		
GEN BUS 306	Business Analytics I	3
	Or approved Business Analytics course for Actuarial Science major, Economics major, or Economics certificate students. ¹	
Calculus		
MATH 213	Calculus and Introduction to Differential Equations	3
	or MATH 222	Calculus and Analytic Geometry 2

1

Students pursuing an additional major in Actuarial Science or Economics may opt for a different Business Analytics course. The approved list is detailed on the School of Business Requirements (<http://guide.wisc.edu/undergraduate/business/#requirementstext>) page.

REQUIREMENTS

UNIVERSITY GENERAL EDUCATION REQUIREMENTS

All undergraduate students at the University of Wisconsin–Madison are required to fulfill a minimum set of common university general education requirements to ensure that every graduate acquires the essential core of an undergraduate education. This core establishes a foundation for living a productive life, being a citizen of the world, appreciating aesthetic values, and engaging in lifelong learning in a continually changing world. Various schools and colleges will have requirements in addition to the requirements listed below. Consult your advisor for assistance, as needed. For additional information, see the university Undergraduate General Education Requirements (<http://guide.wisc.edu/undergraduate/#requirementsforundergraduatetext>) section of the *Guide*.

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|-------------------|--|
| General Education | <ul style="list-style-type: none"> • Breadth—Humanities/Literature/Arts: 6 credits • Breadth—Natural Science: 4 to 6 credits, consisting of one 4- or 5-credit course with a laboratory component; or two courses providing a total of 6 credits • Breadth—Social Studies: 3 credits • Communication Part A & Part B * • Ethnic Studies * • Quantitative Reasoning Part A & Part B * |
|-------------------|--|

* The mortarboard symbol appears before the title of any course that fulfills one of the Communication Part A or Part B, Ethnic Studies, or Quantitative Reasoning Part A or Part B requirements.

SCHOOL OF BUSINESS REQUIREMENTS

The Wisconsin Bachelor of Business Administration (BBA) degree program is based on a broad educational foundation combined with courses in business and economics. This curriculum is designed for those students who wish to prepare for careers in business. Students completing any School of Business major (<http://guide.wisc.edu/undergraduate/business/#requirementstext>) are required to satisfy a common set of Pre-Business Requirements, Liberal Studies Requirements, Business Preparatory Requirement, Business Core Requirement, Business Breadth Requirement, and Credits for BBA Degree.

Code	Title	Credits
School of Business BBA Requirements		
Complete requirements: (http://guide.wisc.edu/undergraduate/business/#requirementstext)		
	Pre-Business	
	Liberal Studies	
	Business Prep	

Business Core
Business Breadth

FINANCE MAJOR REQUIREMENTS

See the Advising and Careers tab (p. 3) for helpful progression advice or the Four-Year Plan tab (p. 2) to see a sample on how to graduate in four years.

Code	Title	Credits
MATH 213	Calculus and Introduction to Differential Equations	3
or MATH 222	Calculus and Analytic Geometry 2	
ACCT I S 301	Financial Reporting I	3
FINANCE 305	Financial Markets, Institutions and Economic Activity	3
FINANCE/ ECON 320	Investment Theory	3
FINANCE 325	Corporation Finance	3
FINANCE 330	Derivative Securities	3
Complete two 3-credit Finance courses numbered above 330 ¹		6
Total Credits		24

1

Each course must be at least 3 credits each.

UNIVERSITY DEGREE REQUIREMENTS

Total Degree To receive a bachelor's degree from UW-Madison, students must earn a minimum of 120 degree credits. The requirements for some programs may exceed 120 degree credits. Students should consult with their college or department advisor for information on specific credit requirements.

Residency Degree candidates are required to earn a minimum of 30 credits in residence at UW-Madison. "In residence" means on the UW-Madison campus with an undergraduate degree classification. "In residence" credit also includes UW-Madison courses offered in distance or online formats and credits earned in UW-Madison Study Abroad/Study Away programs.

Quality of Work Undergraduate students must maintain the minimum grade point average specified by the school, college, or academic program to remain in good academic standing. Students whose academic performance drops below these minimum thresholds will be placed on academic probation.

LEARNING OUTCOMES

1. Apply proper controls and best practices in the governance of modern organizations while recognizing the impact of finance on business and society.
2. Explain the workings of financial markets, the role of financial intermediaries, and market mechanisms to create and trade securities.
3. Evaluate the risk and return of financial securities and transactions.

4. Interpret models of asset pricing and demonstrate how to value financial securities.
5. Learn and apply best practices in data-driven decisions about investments, financing and payout policies, corporate restructuring, and risk management.
6. Identify the role of financial technology in shaping the financial system and financial operations.
7. Formulate a comprehensive financial plan for individuals or business entities.

FOUR-YEAR PLAN

Please use this recommended course sequencing guide as a reference point as you work with your academic advisor to plan your schedule throughout your BBA experience. This guide is intended for students whose primary major and career interests are in finance. Many business breadth and core finance courses are recommended early on so that students are prepared for the internship interview process which begins as early as sophomore year. There are several factors that may impact your optimal course sequencing plan, so please consult with your academic advisor.

Freshman

Fall	Credits	Spring	Credits	Summer	Credits
MATH 211 or 221	5	MATH 213 or 222	3	3-4	See footnote 3
PSYCH 202	3	GEN BUS 306	3		
ECON 101	4	ACCT I S 100	3		
GEN BUS 110 ¹	1	ECON 102	3-4		
GEN BUS 106	1	FINANCE 200 ²	1		
Communications A	3-4				

17-18

13-15

0

Sophomore

Fall	Credits	Spring	Credits	Summer	Credits
FINANCE 205 ²	1	FINANCE/ ECON 320	3	3	Internship
FINANCE/ ECON 300	3	FINANCE 325	3		
FINANCE 305	3	MARKETNG 300, M H R 300, or OTM 300	3		
ACCT I S 301	3	GEN BUS 360	3		
GEN BUS 307	3	Ethnic Studies	3		
MARKETNG 30C M H R 300, or OTM 300	3				

16

15

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Junior

Fall	Credits	Spring	Credits	Summer	Credits
FINANCE 330	3	MARKETNG 300, M H R 300, or OTM 300	3	3	Internship
Finance Elective ⁴	3	Business Breadth	3		
ACCT I S 211	3	Ethics ⁵	4		

Electives	6 Humanities or Social Science	3	
	Elective	3	
	15	16	0
Senior			
Fall	Credits	Spring	Credits
Finance Elective ⁴	3 Business Breadth		3
GEN BUS 301	3 Humanities, Literature, or Social Science		3
Humanities, Literature, or Social Science	3 Science		3
Science Elective	3 Electives		4
	3		
	15	13	

Total Credits 120-123

1

Pre-business admits will take this course in the term of admission to the Wisconsin School of Business.

2

This is the recommended course but any elective is acceptable.

3

Taking summer courses is an option to reduce credit loads during the traditional semesters. Ideal classes to take over the summer include: MARKETNG 300, M H R 300, OTM 300, ACCT I S 211, ECON 102 and Business Breadth.

4

This can be any 3 credit FINANCE course numbered above 330.

5

Students must choose one of the following courses: PHILOS 241 Introductory Ethics, PHILOS 243 Ethics in Business, PHILOS 341 Contemporary Moral Issues, PHILOS/ENVIR ST 441 Environmental Ethics

ADVISING AND CAREERS

ADVISING

Advising is an integral part of any student's educational journey in the School of Business Undergraduate Program. Starting at Student Orientation, Advising, and Registration (SOAR), we encourage all students to connect with academic advisors. Business academic advisors have a wealth of knowledge about courses on campus, as well as policies and procedures.

Business career coaches help students with career exploration, internships, resumes, job search, interviewing and more. We encourage students to connect with their career coach once they arrive on campus.

Business academic advisors and career coaches are passionate about student success. Students experiencing academic difficulty or personal struggles are encouraged to talk to their advisor about how their individual situation may affect their academic performance.

ASSIGNED ACADEMIC AND CAREER COACHES

Admitted business students will have one assigned academic advisor. Career coaches are assigned by academic major to be able to provide industry-specific career guidance. If a student has more than one major, they may have more than one assigned career coach. Students can find their assigned advisor and coach by logging into the Starfish portal through MyUW.

For students not yet admitted to the School of Business, there is a team of pre-business advisors available.

ACCESSING ADVISING

Drop-in advising and scheduled appointments are available for admitted business students. Pre-business students may also schedule an appointment with a pre-business academic advisor or utilize drop-in academic advising.

For more information on accessing academic advising, please see our academic advising page (<https://business.wisc.edu/undergraduate/academic-advising/>).

For more information on accessing career coaching, please see our career coaching page (<https://business.wisc.edu/undergraduate/careers/>).

PLANNING FOR THE FINANCE MAJOR

In preparation for completing the major requirements for the Finance major, taking these courses early will help you graduate in a timely fashion.

Code	Title	Credits
Prior to enrolling in FINANCE/ECON 320, FINANCE 325, or FINANCE 330, plan to take:		
FINANCE/ ECON 300	Introduction to Finance	3
MATH 213	Calculus and Introduction to Differential Equations	3
or MATH 222	Calculus and Analytic Geometry 2	
GEN BUS 307	Business Analytics II (can be taken concurrently) ¹	3
Prior to enrolling in FINANCE 325 take:		
ACCT I S 301	Financial Reporting I	3
Prior to your third year, complete:		
FINANCE/ ECON 300	Introduction to Finance	3
GEN BUS 307	Business Analytics II ¹	3
ACCT I S 301	Financial Reporting I	3

Other guidance:

It is recommended to take FINANCE/ECON 320 before or concurrently with FINANCE 330; FINANCE 330 is the most quantitatively challenging of the three required courses beyond principles.

If the mathematics requirement has not been completed prior to admission to the School of Business, then you must take MATH 213 and MATH 222 as early as possible.

Prior to your summer internship it can be useful to complete certain finance electives that match your internship and/or career focus area. Please discuss with your advisor.

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CAREERS

Finance is the integration of time, returns and risk and how they are interrelated. Two pressing questions in finance are:

- What do I invest in?
- How do I pay for it?

Organizations that focus on finance include banks, credit card companies, insurance companies, consumer finance companies, corporations, stock brokerages, investment funds, government sponsored enterprises, education, and individuals.

Students may pursue careers in many different industries, including but not limited to:

- Commercial and retail banking
- Corporate finance
- Investment banking
- Investment management
- Investment research
- Global markets (sales and trading)
- Financial technology/cryptocurrency
- Wealth management and financial planning

Find more details about these industries on the BBA Finance website (<https://business.wisc.edu/undergraduate/majors/finance-investment-banking/>).

More information on Career Pathways (<https://business.wisc.edu/undergraduate/careers/pathways/>).

PEOPLE

FACULTY AND STAFF IN FINANCE

For more information about the faculty and their research interests, please visit the [directory](https://business.wisc.edu/directory/) (<https://business.wisc.edu/directory/>).

ACCREDITATION

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AACSB International—The Association to Advance Collegiate Schools of Business (<http://www.aacsb.edu/>)

Accreditation status: Accredited. Next accreditation review: 2026–2027.