

Department of Finance Creative Inquiry Offerings:

- Artificial Intelligence in Finance** - This project provides a novel perspective on using artificial intelligence to study how architecture value affects real estate prices. Students will be guided to create a database based on the building aesthetic values that could be used for modeling house values using machine learning tools. It is an exciting opportunity for students to apply their knowledge from finance and engineering backgrounds to study real-world problems.
 - *Open to all majors, juniors/senior standing. Limited to a team of 7 - most will dual-enroll with Machine Learning CI offering, offered in Fall & Spring semesters.*
 - *1 credit earned – 2 credits if dual-enrolled with other CI*
 - *Interested students should send a resume to Dr. Shen.*
 - *Faculty: Lily Shen (yannans@clemsont.edu)*
- Bloomberg Certification** – Bloomberg terminals are one of the most heavily used and highly regarded professional investment systems to be created for the financial marketplace as it provides real-time financial data, news feeds, messages and also facilitates the placement of financial transactions. Students in this CI receive in-depth training on the Bloomberg machine and can achieve certification once passing the exams. Students will also develop an investment thesis to be tested by the professor.
 - *Must have completed FIN 3050 with a B or higher, students selected based on GPA and resume sent to Dr. Alexander. Offered only in Spring semesters.*
 - *1-3 credits earned*
 - *Faculty: John Alexander (alexanj@clemsont.edu)*
- CFA Seminar** – The CFA charter is the most prestigious certification available in Finance and Investments. Although students can't completely earn the charter while they are still in school, they can begin the process with the Level I exam. The CI group helps students prepare for the exam by having the students develop written study materials and present these topics to the rest of the group.
 - *Senior standing required, must register for the CFA Level I exam in June and enroll in CI for full academic year (fall & spring).*
 - *Scholarships may be available to select students who apply.*
 - *3 credits earned – 1 for Fall semester, 2 for Spring semester*
 - *Faculty: Jack Wolf (jackw@clemsont.edu)*
- CFP Review** - the CFP® Exam is a 6-hour exam covering 72 learning objectives and 6 disciplines. Embarking on a study plan for the exam is often as daunting as the actual exam. The CI course is designed to facilitate an independent study plan to prepare to sit for the CFP® Exam within 9 months after graduating (July or November for a May graduate, March or July for a December graduate).
 - *Open to all Finance majors with Financial Planning emphasis in their last semester. Offered in fall and spring as needed.*
 - *3 credits earned*
 - *Faculty: Josh Harris (jwharri@clemsont.edu)*
- Financial Planning Challenge** – Students will work as a team to write a comprehensive financial plan for a case study client during the spring semester as part of the national Financial Planning Challenge hosted by the Financial Planning Association. Schools chosen to attend the fall national conference will present the financial plan orally and participate in a quiz bowl. The top three schools are awarded monetary scholarships.
 - *Open to all Finance majors with Financial Planning emphasis. Offered only in Spring semesters.*

- *3 credits earned*
 - Faculty: Josh Harris (jwharri@clemsun.edu)
6. **Global Research Challenge** - The CFA Research Challenge, organized by the CFA Institute and its member Societies, involves the valuation of a publicly traded company. Just like a Wall Street analyst would do for a research report, the team of students must come up with a one-year target price for the stock along with a Buy/Hold/Sell recommendation. The students must research the company, its industry, competitors, customers, and market trends to make assumptions that are used in a financial model projecting future performance. In this project, students develop teamwork, analytical, written and oral communication skills to write their report and present to a panel of investment professionals. Clemson teams have made it to the finals round of the Southern Classic in three of the past five years and hope to advance to regional or worlds in the future!
- More information:
<http://www.cfainstitute.org/community/challenge/Pages/index.aspx>
 - *Senior standing required – limited to a team of 5 each year, must enroll in CI for full academic year (fall & spring).*
 - *3 credits earned – 1 for Fall semester, 2 for Spring semester*
 - Faculty: Jack Wolf (jackw@clemsun.edu)
7. **Machine Learning in Finance** - This project will bring students across disciplines together to develop the most wanted applications of machine learning in finance and real estate investments. Students will collaborate and learn to use big data and Machine Learning tools to solve questions in the business world. This project will help students across different departments, creating the environment of a startup company.
- *Open to all majors, juniors/senior standing. Limited to a team of 7 - most will dual-enroll with Artificial Intelligence CI offering.*
 - *1 credit earned – 2 credits if dual-enrolled with other CI*
 - *Interested students should send a resume to Dr. Shen.*
 - Faculty: Lily Shen (yannans@clemsun.edu)
8. **SIE** - The Securities Industry Essentials Exam is the entry-level securities exam for any individual pursuing a position as financial professional registered with a Bank, Insurance Company, or Broker/Dealer. The CI course is designed to facilitate an independent study plan to prepare to sit for the SIE Exam within 2 months of completing the course (taken over winter break for fall term, over summer break for spring term).
- *Open to any Finance major, offered each Fall II and Spring II half-term (7-week term) – only need to take one semester.*
 - Faculty: Josh Harris (jwharri@clemsun.edu)