

MSFA Assurance of Learning Report

AY 2017-2018

Report Date: May 16, 2018
School/College: School of Management
Department/Program: Master of Science in Financial Analysis
Person completing the Report: John Gonzales

Phase 1: Assessment Process

Overview Statement: Briefly summarize the student learning assurance activities that were undertaken this academic year. Indicate which learning outcome was assessed and who was involved in the evolution.

Learning Outcome: *Learning Outcome: 3-3 Ethics – Duties to Investors*

Specify and quantify investor objectives, constraints, and preferences and develop an appropriate investment policy statement. Develop strategies for managing portfolios of domestic and foreign debt and equity securities including the use of derivative securities to adjust risk exposure to meet the investor policy goals.

Evaluator: *John Gonzales*

Assessment Plan:

Assessment Method Category: *Prepare a Report*

Assessment Method: *Prepare a comprehensive Investment Policy Statement and Asset Allocation.*

Target: *75% of the students will achieve a "Satisfactory level" or better for the report.*

Courses where method is assessed (if applicable): *MSFA 746: Portfolio Management.*

Additional Detail (if applicable): *Worked on over a six-week period in MSFA 746 in stages with instructor feedback.*

Phase 2: Results Assessment

Results:

Result Date: *5/14/18*

Result Type: *Target Met*

Result: *All students successfully completed a comprehensive Investment Policy Statement and Asset Allocation.*

Course from which the assessment(s) were gathered: *MSFA 746-01, Spring 2018, Fall 2016 Part-time MSFA cohort.*

Related Documents:

- *Reports on file with John Gonzales*