Date: March 14, 2024

To: Chad A. Middleton, Ph.D., AVPAA for Faculty Success, Sylvia L. Rael, Director of Tomlinson Library, and Anne Bledsoe, Research Librarian & Head of Instruction  
From: Dr. Yen-Sheng Lee

Re: Open Educational Resources (OER) Grant Report for *FINA 301 Managerial Finance OER Proposal*

Dear Dr. Middleton, Director Rael, and Research Librarian Bledsoe

Enclosed is Open Educational Resources (OER) Grant Report for *FINA 301 Managerial Finance OER Proposal*. I make OER available in my *FINA 301* course shell in D2L and plan to make it available on CMU’s *Courses using Open Educational Resources* website ([Courses using Open Educational Resources | Colorado Mesa University](https://www.coloradomesa.edu/oer/courses.html)) before Summer 2024. Each of 32 *FINA 301* students save $100, totaling $3,200.

Please let me know if you have any questions or if I should follow up regarding the OER Grant Funds. I am appreciated for the *OER* opportunity you offered and the support from and review by Anne Bledsoe.

Sincerely,

Yen-Sheng Lee, Ph.D., Chartered Financial Analyst (CFA)

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**FINA 301 Managerial Finance**

**Open Educational Resources**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Week 1 - An Overview of Financial Management

* Read Chapter 1 Introduction to Finance <https://openstax.org/details/books/principles-finance>
* Read Chapter 2 Corporate Structure and Governance <https://openstax.org/details/books/principles-finance>

## Week 2 – Financial Markets and Institutions

* Read Chapter 1 Role of Financial Markets and Institutions, Financial Markets and Institutions 13th edition by Jeff Madura (available on eReserve through Tomlinson Library & click the [address link](https://sierra.marmot.org/patroninfo))

## Week 3 – Financial Statements, Cash Flow, and Taxes

* Read Chapter 5 Financial Statements <https://openstax.org/details/books/principles-finance>

## Week 5 – Analysis of Financial Statements

* Read Chapter 6 Measures of Financial Health <https://openstax.org/details/books/principles-finance>

**Week 6 – Time Value of Money**

* Read Chapter 7 Time Value of Money I: Single Payment Value <https://openstax.org/details/books/principles-finance>
* Read Chapter 8 Time Value of Money II: Equal Multiple Payments <https://openstax.org/details/books/principles-finance>

## Week 7 – Interest Rates

* Read Chapter 3 Economic Foundations: Money and Rates <https://openstax.org/details/books/principles-finance>

## Week 9 – Bonds and Their Valuation

* Read Chapter 10 Bonds and Bond Valuation <https://openstax.org/details/books/principles-finance>

## Week 10 – Risk and Rates of Return

* Read Chapter 12 Historical Performance of US Markets <https://openstax.org/details/books/principles-finance>
* Read Chapter 15 How to Think about Investing <https://openstax.org/details/books/principles-finance>

## Week 11 – Stocks and Their Valuation

* Read Chapter 11 Stocks and Stock Valuation <https://openstax.org/details/books/principles-finance>

**Week 13 – The Cost of Capital**

* Read Chapter 17 How Firms Raise Capital <https://openstax.org/details/books/principles-finance>

## Week 14 – The Basics of Capital Budgeting

* Read Chapter 16 How Companies Think about Investing <https://openstax.org/details/books/principles-finance>

## Week 15 – Cash Flow Estimation and Risk Analysis

* Read Chapter 12 Cash Flow Estimation and Risk Analysis, Fundamentals of Financial Management 16th edition by Brigham and Houston (available on eReserve through Tomlinson Library & click the [address link](https://sierra.marmot.org/patroninfo))

The OpenStax text used for this course is licensed under the Creative Commons license Attribution 4.0 International (CC BY 4.0):

Dahlquist, J., & Knight, R. (2022). Principles of Finance. OpenStax. <https://openstax.org/details/books/principles-finance>

Additionally, this course uses a chapter (available on eReserve through Tomlinson Library) from each of the following textbooks:

Brigham, E. F., & Houston, J. F. (2021). Fundamentals of Financial Management (16th ed.). Cengage Learning.

Madura, J. (2020). Financial Markets and Institutions (13th ed.). Cengage Learning.