

Business Administration – Finance (Advanced Diploma)



Meet our students

Our students gain the essential finance skills needed to succeed in today's business world. Throughout their studies they receive hands-on experience with computer software currently being used in the industry and cover key finance topics and practices. Students can choose from a range of finance electives in their final two terms, including courses that can make them eligible to work towards their Qualified Associate Financial Planner (QAFP) or Certified Financial Planner (CFP) designation (when passed with the appropriate grades).

Learn more about the classes these students take by visiting [the program webpage](#).

Core competencies and skills

- Processing and maintaining financial records in conjunction with policies and procedures.
- Preparing financial information and reports.
- Analyzing financial reports using financial mathematics and statistics.
- Developing and implementing marketing strategies to promote financial products and services.
- Preparing and presenting verbal and written management and financial reports.
- Ensuring documentation is accurate and properly reflects client/business intentions.

Students also complete coursework for the Mutual Funds Course (IFIC) ahead of Work Term 1, and Course 1 of the Canadian Securities Course (CSC) ahead of Work Term 3.

Work term availability

- Winter (January – April)
- Summer (May – August)
- Fall (September – December)

Work term capabilities

- Ordering periodicals, journals and other literature for Investment Advisor and keeping their appointment book/agenda.
- Assembling and sending investor information packages to clients upon request.
- Assisting clients with matters relating to their accounts and/or with opening accounts.
- Providing current price quotations to clients, referring to quote services and trading desk personnel.
- Maintaining current knowledge of client accounts by reviewing daily computer runs.
- Maintaining daily records of trades by client and by type of security.
- Assisting in preparing personal financial plans.
- Analyzing financial statements and credit bureau reports.
- Journalizing, posting and preparing trial balances.
- Processing month-end data.
- Handling accounts payable and accounts receivable.

Employer resources

- [Employer webpage](#)
- [Program information](#)
- [Program course schedule](#)

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