

## Welcome Message ACCT330N721\_25U

Hello everyone, how are you?

Welcome to ACCT330N721\_25U – Financial Statement Analysis!

My name is Xiaoli Wang, and I will be your instructor for this course. Let me start with a brief introduction about myself.

Over 20 years ago, I came to the United States from China to pursue my Ph.D. studies. I earned my Ph.D. in Finance and an MBA from Rutgers University in 2006. After graduation, I worked in the industry for a few years.

My first job was as an equity analyst at Bear Stearns. How many of you have heard about Bear Stearns? It was one of the major investment banks in the U.S. and became even more famous — or infamous — as the first major financial institution to collapse during the 2008 financial crisis. (I can assure you that it was certainly not my fault!) Bear Stearns was later acquired by J.P. Morgan Chase.

After Bear Stearns, I joined Banc of America Securities, the investment banking division of Bank of America. Later, I worked as the Director of Research for a hedge fund before finally joining Marist College as a faculty member in 2011.

I truly love teaching at Marist and enjoy sharing my industry experience and academic knowledge with my students. Please feel free to reach out anytime if you would like to discuss anything related to the course or your learning experience!

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### Course Overview and Requirements

The course syllabus has been posted on Brightspace under Contents > Class Documents. Please read it carefully and let me know if you have any questions.

Here are a few key points to keep in mind:

- **Textbook information:**

Required Text book: Financial Statement Analysis & Valuation, 6e, by Easton, McAnally, Sommers, Zhang, ISBN: 978-1-61853-360-9, by Cambridge Business Publisher

- **Access to MyBusinessCourse**

You must obtain access to mybusinesscourse.com. Detailed instructions are provided in the syllabus and posted on Brightspace under Contents > Class Documents > Student Handout.

- **Class Schedule and Deadlines**

Plan your study schedule carefully! Pay close attention to assignment deadlines and exam dates. All exams will be conducted on MyBusinessCourse.

- The detailed class schedule can be found in the Appendix of the syllabus.

- An Excel file with the class schedule is also posted on Brightspace > Contents > Class Documents.

- **Online Assignments**

Most modules include online assignments which are on mybusinesscourse.com. Please monitor due dates closely — they are outlined in the teaching schedule.

- **Excel Exercises**

Many modules also include an Excel exercise. These exercises are posted on Brightspace > Assignments. Please complete and submit them via Brightspace by their respective deadlines.

- **Group Project**

You will complete a group project involving a comprehensive analysis of a company's 10-K financial report.

- Project details are available on Brightspace > Assignments > Course Project.
- Each group consists of up to 5 students, assigned randomly.
- Group assignments are posted under Brightspace > Contents > Class Documents.

Please review all materials carefully and reach out if anything is unclear.

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Thanks for your attention!

Enjoy the rest of your weekend, and I look forward to our class together on Monday June 2<sup>nd</sup>, 2025.

Best regards,

Xiaoli Wang