

Applied Investment Management, Major

Chairperson: Bin Wang, Ph.D.

The curriculum for the undergraduate Applied Investment Management (AIM) major prepares ethical future investment professionals to apply rigorous analysis and sound judgment to evaluate securities, manage portfolios, and navigate the complexities of capital markets. A strong foundation in finance, economics, and accounting is essential to understanding how markets work and ensuring investment decisions are made with integrity. AIM, therefore, draws from these core disciplines to deliver an education grounded in real-world investment practice and professional excellence.

Students are encouraged to apply to the AIM program when they are ready, typically during freshman year or at the beginning of the fall term of their sophomore year. Acceptance into this major and any associated concentrations is limited and based on:

- Overall academic performance
- Strong performance in courses relevant to investments and financial analysis (e.g., accounting, economics, ethics, finance, mathematics, and statistics)
- A project, one-pager, or essay demonstrating interest
- Resume
- Interview

Click [here \(https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fmarquette.edu%2Fbusiness%2Faim%2Fapplication.php&data=05%7C02%7Cstephanie.werkowski%40marquette.edu%7C5190d951d00a4e2c767b08ddf53501e2%7Cabe32f68c72d420db5bd750c63a268e4%7C0%7C0%7C638936330200104977%7CUnknown%7CTWfPbGZsb3d8eyJFbXB0eU1hcGkiOnRydWUslYiOilwLjAuMDAwMCIslIAiOiJXaW4zMilslkFOljoiTWFpbcIslldUJjoyfQ%3D%3D%7C0%7C%7C%7C&sdata=CFmMPJ57bspt%2Fjhllbcb3pF8yqUXht3aB%2FZMoq%2Bf4o%3D&reserved=0\)](https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fmarquette.edu%2Fbusiness%2Faim%2Fapplication.php&data=05%7C02%7Cstephanie.werkowski%40marquette.edu%7C5190d951d00a4e2c767b08ddf53501e2%7Cabe32f68c72d420db5bd750c63a268e4%7C0%7C0%7C638936330200104977%7CUnknown%7CTWfPbGZsb3d8eyJFbXB0eU1hcGkiOnRydWUslYiOilwLjAuMDAwMCIslIAiOiJXaW4zMilslkFOljoiTWFpbcIslldUJjoyfQ%3D%3D%7C0%7C%7C%7C&sdata=CFmMPJ57bspt%2Fjhllbcb3pF8yqUXht3aB%2FZMoq%2Bf4o%3D&reserved=0) to learn more and apply for the AIM Major; <https://www.marquette.edu/business/aim/application.php>. For more information contact:

- AIM CFA: Investments Concentration - Michael Blonski, CFA at 414-288-6893 or michael.blonski@marquette.edu
- AIM Private Capital & Investment Banking Concentration – Jeff Germanotta at 414-288-7146 or jeffrey.germanotta@marquette.edu

Students studying Applied Investment Management (AIM) must complete an additional primary major within the College of Business. This major can only be completed through pursuing one of the listed concentrations.

AIM CFA: INVESTMENTS Concentration

AIM CFA: Investments allows a select group of finance majors to get hands-on academic and financial analysis experience, including an opportunity to actively manage domestic and international equity and fixed-income portfolios. It is designed for students interested in becoming Chartered Financial Analysts (CFAs), preparing them to begin a career in the money management industry. CFA: Investments, therefore, is rooted in the foundations of valuation.

Students in the CFA: Investments Concentration must also have a declared primary major in Finance (15 credits).

Code	Title	Hours
ACCO 3001	Intermediate Accounting I	3
ACCO 4080 or ACCO 5080	Analysis of Financial Statements	3
AIM 4310	Sector and Company Investment Analysis	3
AIM 4320	Identifying, Valuing and Communicating Investment Opportunities	3
AIM 4330	Advanced Research Techniques for Investment Analysis	3
FINA 4065	Fixed Income Securities	3
FINA 4075 or FINA 5075	FinTech Foundations and Applications	3
AIM 4470 or FINA 4085 or FINA 4191	Applied Regulatory Technology and Quantifying the Ethical Implications of Financial Investments	3
International Course - Choose one of the following:		3
ACCO 4040 or ACCO 5040	International Accounting	
ECON 4040	International Economics	
ECON 4044	Global Integration of Financial Sectors	

ECON 4045	Comparative Economic Systems	
ECON 4046	International Trade	
ECON 4080	Money, Banking and Monetary Policy	
FINA 4040	International Finance	
or FINA 5040	International Finance	
ACCOI 4931	Topics in Accounting-International	
FINAI 4931	Topics in Finance-International	
INBUI 4931	Topics in International Business-International	
AIM 4996	AIM Being the Difference	1
Upper Division Business Electives included in the Finance primary major		9-15
Total Credit Hours:		37-43

Note: Any waivers/transfers of course requirements must be approved by both the AIM program executive director and the assistant dean for undergraduate programs.

a. Students accepted into the CFA: Investments concentration must earn a B- or better in all primary and secondary major requirements (including FINA 3001 Introduction to Financial Management, FINA 4001 Advanced Financial Management, FINA 4011 Investment Analysis, and AIM 4996 AIM Being the Difference).

b. All students in the CFA: Investments concentration must complete 10 hours of community service per term, monitored by the program director.

c. Maintain a minimum cumulative GPA of 3.000 during the entire program. Failure to meet academic standards in any term may result in the student being dropped from the AIM major.

d. If a student leaves or is dropped from the CFA: Investments concentration, the credits they have earned will be applied, where possible, to their major requirements, upper-division business electives, or other appropriate degree requirements. However, additional credits may still be necessary to complete a business major in the College of Business Administration. Consultation with a student's adviser or the Swift Student Center may be necessary.

e. A Non-Fungible Token (NFT) is issued by the AIM program certifying completion of the AIM major.

f. Dual enrollment in multiple AIM concentrations is not permitted.

AIM private capital & investment banking concentration

This concentration immerses a select group of Marquette students in the intricate world of private capital (private equity, private debt, venture capital, etc.) and investment banking, emphasizing ethical stewardship, strategic growth, and value creation. Students gain hands-on experience evaluating and structuring high-impact financial deals, from mergers and acquisitions to capital raises. Through applied learning, they refine skills in financial analysis, strategic advising, and deal execution, preparing them to leverage market opportunities and navigate the complexities of global capital markets responsibly.

Code	Title	Hours
ACCO 4080	Analysis of Financial Statements	3
or ACCO 5080	Analysis of Financial Statements	
AIM 4470	Applied Regulatory Technology and Quantifying the Ethical Implications of Financial Investments	3
or FINA 4085	Sustainable Finance	
or FINA 4191	Private Equity, Ethics and Society	
AIM 4310	Sector and Company Investment Analysis	3
or AIM 4400	Applied Ingenuity, Analytics, and Valuation	
or FINA 4210	Commercial Bank Loan Underwriting	
FINA 4081	Investment Banking	3
or FINA 4023	Applied Venture Capital	
or FINA 4191	Private Equity, Ethics and Society	
MARK 4094	Professional Selling	3
or FINA 4084	Institutional Investment Consulting	
AIM 4996	AIM Being the Difference	1
Upper Division Business Electives (courses completed in primary major)		15
Total Credit Hours:		31

Note: Any waivers/transfers of course requirements must be approved by both the AIM program executive director and the assistant dean for undergraduate programs.

- a. Students accepted into the Private Capital and Investment Banking concentration must earn a B- or better in AIM major specific courses (including ACCO 4080 Analysis of Financial Statements or FINA 4075 FinTech Foundations and Applications, AIM 4996 AIM Being the Difference).
- b. All students in the Private Capital and Investment Banking concentration must complete 10 hours of community service per term, monitored by the program director.
- c. Maintain a minimum cumulative GPA of 3.000 during the entire program. Failure to meet academic standards in any term may result in the student being dropped from the AIM major.
- d. If a student leaves or is dropped from the Private Capital and Investment Banking concentration, the credits they have earned will be applied, where possible, to their major requirements, upper-division business electives, or other appropriate degree requirements. However, additional credits may still be necessary to complete a business major in the College of Business Administration. Consultation with a student's advisor or the Swift Student Center may be necessary.
- e. A Non-Fungible Token (NFT) is issued by the AIM Program certifying completion of the AIM major.
- f. Dual enrollment in multiple AIM concentrations is not permitted.

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College of Business Administration Policies

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