

Student Managed Fund



**The SMF Application**

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Last) (First) (Middle Initial)

Peoplesoft #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Campus: Hartford Stamford Storrs

Program: Undergraduate MBA MSFRM

Expected Date of Graduation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (MM/YYYY)

Cumulative GPA: \_\_\_\_\_\_\_\_\_\_\_

**Finance Background and Experience**

*Academic*: Please list all finance courses taken with the instructor’s name and final grade. If you are currently taking a finance course, then list that as well with your last grade received.

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| --- | --- | --- | --- |
| Course Name | Course # | Instructor | Grade |
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|  |  |  |  |

**Other:**



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**Conditions of Acceptance**

*(Please explain if you answer “no” to any of these questions)*

Are you available for at least two meetings during the week for the Fund? Each meeting is about 2 hours long. Meeting times are decided by the students?

**YES NO**

In addition to the meetings, does your schedule permit commitment of time to the Fund for research, analysis, and writing of reports? Each report takes several hours of research and analysis?

**YES NO**

Will you be able to attend SMF events (seminars, special sessions, meetings with the IAB and Foundation) if you are given 2 - 3 weeks advance notice? Many of these events are held in late afternoons or in the evenings?

**YES NO**

Are you agreeable to attend SMF events (seminars, special sessions, meetings with IAB and Foundation) during school closings (normally, these events are always held during regular academic sessions, but rarely some events may happen during school closings like Spring Break)? Please note that non-attendance at any of the IAB and Foundation presentations without prior approval is grounds for immediate dismissal.

**YES NO**

Are you willing to make a commitment to participate in the SMF for the full semesters of next fall and spring?

**YES NO**

The SMF is a significant commitment which entails the full fiduciary responsibility of money management. It is understood that after you accept an appointment as a SMF manager, you commit to serve for the full semesters of next fall and spring, and will not seek or accept any other opportunity with another Accelerator program during this period. Are you willing to accept the SMF on these terms?

**YES NO**

All managers are required to contribute to SMF activities like newsletters, reports to the IAB and Foundation, and a one and five year report. Are you willing to accept these additional responsibilities?

**YES NO**

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_



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**Acceptance of Terms and Conditions**

Please read this and sign this page to indicate your acceptance of the following terms and conditions.

If I am accepted as a SMF manager for the academic year 2018 - 2019, I agree to the following terms:

1. *I am committed to serve as an SMF manager for both the fall and spring semesters.*
2. *I will attend all SMF classes, meetings, presentations to the IAB and the UConn Foundation. I understand that these may be held during Spring Break and Spring weekend and other regular breaks during the academic year.*
3. *I will submit a copy of my transcript to Prof. Ghosh at the end of this semester.*

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Full name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_