

## THE MIZZOU INVESTMENT FUND MANAGEMENT PROGRAM

Department of Finance  
College of Business  
University of Missouri

**Introduction:** The Mizzou Investment Fund Management Program is a student-run investment portfolio that allows undergraduate and graduate students of the University of Missouri – Columbia to participate in the decision-making and management of an endowment fund. Within the framework of an academic class, students analyze securities, set asset allocation targets, and make investment decisions for a portfolio of investment securities. Prerequisites: The class is a dedicated course in the Department of Finance of the College of Business. All students of the University of Missouri – Columbia who will have completed the prerequisite courses before enrolling in the course are eligible. Admission to the course is limited and determined by an application process. At the time of application, the applicant must have completed or be enrolled in the following prerequisite courses:

### Undergraduate students

FIN 3000 – Corporate Finance

FIN 4020 – Investments

FIN 4120 – Security Analysis or FIN 4620 – Investment Strategy of Warren Buffett

### Graduate students

FIN 7410 – Managerial Finance I or equivalent

FIN 7420 – Managerial Finance II or equivalent

FIN 7620 – Investment Strategy of Warren Buffet or

FIN 7620 – Investment Strategy of Warren Buffett

**Benefits of the Program:** Participation in the Mizzou Investment Fund Management Program enhances a student's career opportunities by developing critical thinking and leadership skills. While a career in the investment management field is an obvious choice of students participating in the program, students planning for careers in other fields can benefit from the skills learned and developed in the course. For example, the financial analysis performed when analyzing a company for investment are useful to commercial loan officers of a bank and leadership skills developed by student managers of the fund are useful to business executives and government officials of all types.

**Description:** Over the course of the semester, students identify and critically analyze securities for potential investment in the fund. Student analysts will develop comprehensive analysis reports and present their recommendation to the rest of the class for discussion and investment decision. Students must maintain awareness of economic and market conditions during the semester, especially keeping vigilant regarding his/her selected securities. Officers are selected to manage the fund, and each student participates in one of three committees: Portfolio, Economics, or External Relations. The course instructor oversees the class officers and critiques reports and presentations. Student Evaluation: Evaluation of student performance by the instructor contains both subjective and objective components and is based on factors such as students' written security analyses, presentation of the analyses, active participation during the class and outside the class in committee meetings, and effective leadership (for officers).

**Admission:** Admission to the Mizzou Investment Fund Management Program is by application. Students accepted into the program may then enroll in the appropriate (undergraduate or MBA) section of the course. Refer to the Application for Admission for the relevant application deadline.

**APPLICATION FOR ADMISSION  
MIZZOU INVESTMENT FUND MANAGEMENT PROGRAM  
Summer & Fall 2011 Semester**

Applications due: 5:00 pm, April 15, 2011  
Please turn in to the Department of Finance, 403 Cornell

Admission decisions will be communicated by email to all applicants by April 25, 2011.  
Undergraduate students will enroll in FIN 4820 section 1  
Graduate students will enroll in FIN 7820 section 1

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

Program: (check one) \_\_\_ MBA \_\_\_ BSBA Major: \_\_\_\_\_

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

Session applying for: (check one) \_\_\_ Summer 2011 \_\_\_ Fall 2011

Indicate the courses you have completed or will complete prior to the IFM enrollment term, either at MU or another university:

**Undergraduate Courses**

- \_\_\_ FIN 3000 – Corporate Finance
- \_\_\_ FIN 4010 – Financial Management
- \_\_\_ FIN 4020 – Investments
- \_\_\_ FIN 4030 – Financial Intermediaries
- \_\_\_ FIN 4120 – Security Analysis
- \_\_\_ FIN 4220 – Portfolio Management
- \_\_\_ FIN 4620 – Investment Strategy of Investments Warren Buffett

**Graduate Courses**

- \_\_\_ FIN 7410 - Managerial Finance I
- \_\_\_ FIN 7420 - Managerial Finance II
- \_\_\_ FIN 8320 - Financial Markets
- \_\_\_ FIN 8330 – Investment Policy and Portfolio Management
- \_\_\_ FIN 8360 – Equity and Securities Analysis
- \_\_\_ FIN 8370 – Fixed Income Security Analysis
- \_\_\_ FIN 8440 – Derivative Financial Securities
- \_\_\_ FIN 8530 – Real Estate Portfolio Analysis
- \_\_\_ FIN 8560 – Real Estate Securities Analysis
- \_\_\_ FIN 7620 – Investment Strategy of Warren Buffer

GPA at MU: \_\_\_\_\_ Expected graduation date: \_\_\_\_\_

Please attach the following items:

1. A one-page (maximum) statement detailing why you are interested in this program.
2. A current resume

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