

# Undergraduate Student Investment Fund (USIF)

Center for Investment Studies  
USC Marshall School of Business

# Application

2019-2020 Academic Year

**Please email your completed application, and attachments in ONE PDF file to [investment@marshall.usc.edu](mailto:investment@marshall.usc.edu) by 5pm on Sunday, January 27, 2019**

First Name \_\_\_\_\_

Last Name \_\_\_\_\_ Student ID # \_\_\_\_\_

Email Address \_\_\_\_\_ Phone # \_\_\_\_\_

Current Address \_\_\_\_\_

Current Degree Program \_\_\_\_\_

Major \_\_\_\_\_ Minor \_\_\_\_\_ Expected Graduation Date \_\_\_\_\_

**College(s) Attended** (Please list the most recent enrollment first, including USC )

School Name	From	To	Cum. GPA	Major GPA	Degree
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

**Finance, Economics & Accounting Courses Taken** (Including current semester)

Course Name	Course Code	Date Completed	College	Grade Received
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**Two semester commitment:** USIF is a two-semester class (Fall and Spring). Students who enroll in the class are required to participate during both semesters. Can you commit to enrolling in both the Fall and Spring?  Yes

**Additional commitments:** Can you commit to all of the following:  Yes

1. Attend special classes and meetings during the transition period from **March 1, 2019 to March 31, 2019** to receive training and preparation for assuming full fund management responsibilities as of April 1, 2019.
2. Upon assuming the student manager role, attend the classes (during business hours on Mondays) and meet regularly outside of class with co-managers to manager your portfolio, carry out your primary fund role (trader, accountant, marketing or recruiting), and maintain at least a 3.30 GPA.
3. Attend and support the USIF 2019 Annual Meeting, April 24, 2019, and attend the USIF 2020 Annual Meeting.

**Prerequisites/Co-requisites:** Prior to enrolling in USIF, students are required to complete Financial Analysis and Valuation (FBE 421) and have completed or be concurrently enrolled in Investments (FBE 441). Do you meet this requirement?  Yes

**Availabilities for Interview(s):** Indicate your availability during the following periods for potential interviews

The week of January 28 – February 1, 2019 : \_\_\_\_\_

The week of February 4 – February 8, 2019: \_\_\_\_\_

The week of February 11, 2019 – February 15, 2019 : \_\_\_\_\_

The week of February 19, 2019 – February 22, 2019 : \_\_\_\_\_

**Read, sign and date the following statement:**

I certify that the information provided herein is complete and accurate. I authorize the Faculty instructor and members of the USC USIF to make reasonable inquiry regarding my application. I understand that falsifying or withholding information in completing this application constitutes grounds for immediate withdrawal of my application from consideration, and cancellation of my enrollment in the course.

Signature of Applicant: \_\_\_\_\_ Date: \_\_\_\_\_

**Attachments (Please include the following with your completed application; double-space your personal statement):**

1. A copy of your resume.
2. A personal statement (750-word maximum). In one page, explain why you are interested in the USIF and how working as a USIF manager would contribute to your career objectives in one page. In another page, explain your unique skill sets and how you can contribute to the USIF program.
3. A write up on how you would approach generating a stock pitch (250-500 words). What would your screening process look like? What information would you want to analyze, and how would you ultimately determine a buy or sell recommendation?  
Note: Do not actually pitch an investment idea.

**Requirements (Candidates must demonstrate the following qualities):**

To be eligible, students must currently be enrolled in the USC Marshall Undergraduate Program, be in good academic standing with a minimum cumulative 3.0 GPA at the time of application and plan to graduate no earlier than spring semester following selection for the program. All applicants are also required to have successfully completed BUAD 306. Prior to enrolling in USIF, undergraduate students are required to complete Financial Analysis and Valuation (FBE 421) and complete or be concurrently enrolled in Investments (FBE 441).

1. High intellectual curiosity.
2. Serious commitment in the areas of asset management and/or investment banking.
3. Excellent verbal and written communication skills.
4. Outstanding leadership and teamwork skills.
5. Highly professional demeanor.

**Selection Process:**

The Recruiting Committee will review your application and make recommendations for first round interviews (up to 30 minutes), which will be conducted by the USIF 2019 managers. **In this interview, all applicants will be asked to walk through a case study involving an investment idea and provide their feedback. Supporting documents will be provided to applicants before the interview, and interviewees will be expected to be familiar with these materials.** In the second round, the USIF instructors will meet with the final candidates for a 20 minute interview. The USIF instructors will consult with an ad hoc faculty committee before the final selection is made. The final class list will be announced by March 1, 2019.

**About USC Marshall Undergraduate Student Investment Fund (USIF):**

The USIF is the capstone practicum component of the USC Marshall School of Business' Undergraduate Investment Management degree program.

The educational goals of the course are to give students theoretical training in asset management, experiential financial analysis and valuation, hands on practice managing real capital, and involvement with the operational aspects of running a professional investment management advisory firm.

The USIF seeks to work to maximize the value of its assets under management subject to reasonable risk parameters, while operating in accordance with the investment policies as prescribed by the University Investment Committee.