

Application
for the
Stonehill College Investment Finance Initiative

Department of Business Administration – Finance Program

Please read and complete the entire application (print); sign below on page 1 and page 3; staple any attachments to this application.

Full Name:

Email:

Phone Number

Local Address:

Home Address:

Major:

Other Major / Minor:

Graduation Date:

Current GPA:

PROGRAM COMMITMENT

The Stonehill College Investment Finance Initiative is a multi-year course of study designed to enhance the critical thinking and analytical skills of participants through hands-on academic and security analysis experience. It combines a demanding course of study with internships, mentoring and management of real-money to represent a truly differentiated experience for our students and participating professionals. Admission is through an application process. The SCIFI Academic Committee will consider for admission only those students that have demonstrated a strong intellect, an interest in the field, and a willingness to work very hard. Students admitted to the program agree to take the following 2 courses in the fall and spring of the academic year, in addition to the commitments related to the Herlihy Opportunity Fund.

BUS 432 – Applied Research and Portfolio Management (3 credits) – Offered in the fall semester, this course is designed to develop a student's understanding of the investment analysis and portfolio management process. Emphasis is placed on such topics as: industry research, equity analysis, valuation tools, portfolio management fundamentals, derivatives and alternative investments.

BUS 490 – Directed Study in Finance (3 credits) – Offered in the spring semester, this course enables individual paths of study in the field of investment finance while permitting continued direct involvement in the Student Run Investment Fund. All students enrolled in BUS490 will be required to meet together on a weekly basis and meet specific academic requirements.

Mary Herlihy Opportunity Fund Management – Participants play a direct role in the management of the student run fund and are therefore required to commit at least an additional 2-3 hours per week engaged in activities as an analyst for the fund. Participants are ambassadors for the fund and will be required to participate/attend the SCIFI Speaker Series and related workshops, mentor interested students and engage the participation of alumni investment professionals.

I understand the academic, professional development and personal commitments of the program and, if selected, agree to commit to its requirements to maximize its potential for its participants, Stonehill College and myself.

Signature:

Date

INSTRUCTIONS

Applicants must have completed BUS 203 (Financial Accounting) and BUS320 (Corporate Finance) and be currently enrolled or have completed BUS 327 (Investments). Applicants seeking first round consideration should submit this application form, resume and statements no later than December 10. Spring semester applicants should submit the above by the end of February.

STONEHILL
COLLEGE
INVESTMENT
FINANCE
INITIATIVE



Your application to this program is being made to the Stonehill College Investment Finance Initiative (SCIFI) Faculty Advisory Committee. Please submit the completed application and supporting documentation to Professor Michael Mullen (Stanger 106). The Faculty Advisory Committee will meet to review your application on an as needed basis. You should be prepared for an interview with one or more members of the committee prior to any final decision on your application.

Faculty Advisory Committee: Michael G. Mullen CFA, Program Director

Ginger Meng PhD, Assistant Professor of Finance

J. Richard Anderson CPA, Professor of Accounting

If you have any questions you may contact Professor Mullen by email at mmullen1@stonehill.edu or any other member of the faculty advisory committee.

In addition to this completed application, you are also expected to attach the following:

- **Your resume – reviewed by Career Services** (ask for Christina Burney).
- **Your typed answers to the questions listed below on separate sheets of paper.**
 1. Why do you want to participate in the Stonehill College Investment Finance Initiative and share responsibility for the management of the Mary Herlihy Opportunity Fund?
 2. What knowledge, abilities and skills do you bring to the program? Is there anything else you wish to share that might provide the committee further insights on your potential in the program?
 3. Prepare a three-page (max) response to just one of the following questions:
 - a. Present an equity investment idea for the Herlihy Opportunity Fund. Briefly describe the company and outline why you think the potential for the stock is not fairly reflected in its price.
 - b. Summarize your outlook for both the domestic and global economies over the next year. Give reasons for your predictions and the anticipated effects on domestic and global securities markets.

Finance, Economics & Accounting Courses Taken (include current semester)

Course Name	Course Code	Grade	Date Completed
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
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_____	_____	_____	_____
_____	_____	_____	_____

Other College(s) Attended or Planned to Attend (Study Abroad / Away):

School Name	From	To	Courses Taken / Grade
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

List Team Work Experience and Personal / Professional Accomplishments:

Read, sign and date the following statement:

I certify that the information herein is complete and accurate. I authorize the members of the SCIFI Advisory Committee 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 program and related coursework.

Signature of Applicant _____ Date: _____