



Application

for admittance into the

Stonehill College Investment Finance Initiative

To All Applicants:

Please read and complete the entire application; sign below on page 1 and page 3; staple any attachments to this application. This is confidential information. So place your application in a sealed envelop and deliver to the Administrative Assistant in the Business Department or to Professor Michael Mullen, program director.

Full Name _____

Email Address _____

Cell or Local Phone _____

Mailing Address _____

Major _____ **(Other Major/Minor)** _____

Expected Graduation Date _____

PROGRAM COMMITMENT

The Stonehill College Investment Finance Initiative is a multi-semester 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 challenging 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 considerer for admission only those students that have demonstrated a strong intellect and a willingness to work hard to advance their analytical and professional development skills. Those students accepted into the program begin participation no later than May and agree to:

- (1) Complete various assignments, participate in conference calls and assist in the management of the Herlihy Opportunity Fund throughout the summer months.
- (2) Participate in the *Annual August Workshop* sessions prior to the start of classes.
- (3) Enroll in BUS432 Applied Research & Portfolio Management (fall) and BUS430 Special Topics - Behavior Finance (spring).
- (4) Dedicate a minimum of 4 hours per week in the management of the Opportunity Fund.
- (5) Maintain the highest degree of integrity, act in accordance with the CFA Standards of Practice, and act as ambassadors for SCIFI, the finance major and the College as needed.

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, the College and myself.

Signature of Applicant _____ 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, reviewed resume and statements by the start of the spring semester. Applicants enrolled in BUS327 for the spring semester should indicate interest in the program during the semester, discuss with the program faculty advisor and submit this application prior to the end of the spring semester.

STONEHILL
COLLEGE
INVESTMENT
FINANCE
INITIATIVE



Students with advanced academic standing (typically sophomores) can seek to join the program for their junior year or defer application if they wish to participate in study-away programs.

Your application to this program is being made to the Stonehill College Investment Finance Initiative (SCIFI) Faculty Advisory Committee. 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:

Prof. Michael G. Mullen CFA CAIA, Program Director
Prof. Ginger Meng PhD - Finance
Prof. Richard Anderson CPA - 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 updated resume** – reviewed by the Career Development Center (please ask for Christina M. Burney, Director, Cushing Martin 175).
- ❖ **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. Where would you like to see yourself in 5 years after graduation?
 3. What knowledge, abilities and skills would you bring to the program that you believe will be valuable to yourself and the other members of the group?
 4. Is there anything else you wish to share that might provide the committee further insights on your potential in the program?
- ❖ **Prepare a response to just one of the following questions:**
 - a. Demonstrate your knowledge of financial modeling by preparing a financial forecast and valuation (use the template from BUS327) of a publically traded company that you think could be a good investment for the Opportunity Fund. In three, single-spaced pages provide a summary of your thinking behind the key assumptions in the model.
 - b. Demonstrate your knowledge of economics and strategic thinking by picking a sub-sector of any industry. Identify the major macro drivers of the sector and demonstrate its historical relationship to

corporate performance. Offer at least 3 key micro drivers that could possibly distinguish the winning companies from the losers. Present a professional looking “comp table” showing the valuation metrics for the sector. Your submission should not exceed 8 pages including the comp table.

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

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

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

School Name	Date From	Date 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 courses.

Signature of Applicant _____ Date: _____