

SMILE Fund Application

Thank you for your interest in joining the Student Managed Investment Learning Experience (SMILE) Fund. Only a select few applications will be selected due to limited amount of open spots. All undergraduate majors are eligible to apply.

Applicants will receive a follow-up email requesting completion of a time availability poll for the Fall 2023 semester. Qualified applicants are short-listed for personal interviews before the final selection of student managers are announced.

If you have any questions about your application, please email Dr. Holzauer at hunter-holzauer@utc.edu

* Indicates required question

1. Email *

2. Student Email *

3. First Name *

4. Last Name *

5. UTC ID *

6. Phone Number *

7. What is your current major? *

8. Please add your minor (if any)

9. Expected Graduation Date (Month/Year) *

10. List the course name, number, and instructor for any Finance, Accounting, and/or Statistics courses that you have taken (or are currently taking). For all completed classes, include your grade.

11. Do you have any specific career paths that interest you?

12. What is the highest level of education you wish to attain? *

Mark only one oval.

Bachelors

Masters

Ph.D

CFA

CPA

CFP

Other

13. If you selected "Other", please specify.

14. What is the highest position you wish to attain during your time in the SMILE Fund? *

Mark only one oval.

President

Vice President role (Multiple VPs)

Chief Analyst

Lead Analyst

Unknown at this time

15. Are you interested in being a member of our Marketing team? *

Mark only one oval.

Yes

No

16. Please select your top 3 sectors that you would like to cover if you are chosen as an analyst. *

Check all that apply.

- Information Technology/ Communications Services
- Consumer Discretionary
- Consumer Staples
- Financials
- Real Estate Investment Trusts (REITs)
- Healthcare
- Industrials
- Basic Materials
- Energy/Utilities

17. Please explain your interest in these your top picks, and what qualifications or experience you may have to research in this sector. It's ok if it is merely an interest of yours. *

18. After receiving your application, you will receive a follow-up email that includes a time availability poll. However, there are a few serious time commitments. *

Are you available for at least one meeting during the week for the SMILE Fund? General meetings typically are on Wednesdays 4:45pm to 5:30pm.

Mark only one oval.

Yes

No

19. In addition to weekly meetings, does your schedule permit approximately five to ten hours of time to commit to the SMILE Fund on a monthly basis? Student managers will need to set aside time for research, analysis, and writing reports. *

Mark only one oval.

Yes

No

20. Given advanced notice, will you be able to attend the majority of SMILE Fund events? (This includes our quarterly Investment Strategy Meetings (ISMs)). *

Mark only one oval.

Yes

No

Maybe

21. If you are not a senior, are you willing to make a commitment to participate in the SMILE Fund for at minimum three full semesters? *

Mark only one oval.

Yes

No

22. In 200 words or less (i.e. approximately one to two paragraphs), please summarize your qualifications, motivations, and/or reasons why you should be selected as a student manager for the SMILE Fund. *

23. Do you have a resume? If yes, please include/attach it here with your application. If no, do not be worried. *

Many students have experienced few real opportunities to create or enhance their resumes. The SMILE Fund is wonderful opportunity to improve your resume and impress future employers.

Files submitted:

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