

Student Managed Investment Learning Experience (SMILE) Fund  
Sponsored by the University of Chattanooga (UC) Foundation, Inc.

**Application for the SMILE Fund  
University of Tennessee Chattanooga**

**Instructions:** Please download and open this document using Adobe Acrobat. You may then fill in the fields, save the document and send as an email attachment to the SMILE Fund Faculty Advisor, Dr. Hunter Holzhauer, at [hunter-holzhauer@utc.edu](mailto:hunter-holzhauer@utc.edu). Or you may print out the completed form and hand deliver it to Laura Perryman, the Administrative Specialist for the Finance Department, in Fletcher Hall 412-C. If you have any questions, please contact Dr. Hunter Holzhauer via email. Appointments can be set up if necessary.

Please type "N/A" for any items that do not apply.

**The Due Date is Monday, January 19<sup>th</sup> at 4:00pm!**

**Contact Information**

Full name \_\_\_\_\_  
UTC email address \_\_\_\_\_  
Preferred email address \_\_\_\_\_  
Telephone number \_\_\_\_\_  
Mailing address \_\_\_\_\_

**Area of Specialization**

Major(s) \_\_\_\_\_ Track(s) \_\_\_\_\_  
Minor(s) \_\_\_\_\_

**Academic Progress**

Overall GPA \_\_\_\_\_

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.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Expected graduation date (month/year) \_\_\_\_\_

**Work Experience**

Full-time experience (not including summer jobs/internships) please include:

- Company and location of employment
- Position including official title
- Period of employment (month/year to month/year)
- Brief summary of responsibilities

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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Part-time experience (including summer jobs/internships) please include:

- Company and location of employment
- Position including official title
- Period of employment (month/year to month/year)
- Brief summary of responsibilities

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**Career/Professional Goals**

General goals or industries

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Specific careers or designations

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Additional education goals

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**Position Preferences**

Please list any preference for a specific position in the SMILE Fund, especially if there is a sector of the market that you are interested in covering. Please also briefly list any experience, qualifications, or reasons that might make you particularly suited for one of the positions.

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Are you interested in the President and Chief Investment Strategist position? Please note that among other responsibilities, the President and Chief Investment Strategist is responsible for the annual report and presentation given to the UC Foundation Board. Yes \_\_\_\_ No \_\_\_\_

Are you interested in one of the four Vice President positions? These positions include: VP of Operations, VP of Risk Management, VP of Fundamental Analysis, and VP of Macro and Technical Analysis. Yes \_\_\_\_ No \_\_\_\_

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List the top three sectors (in order) that you would like to cover if you are chosen as a lead sector analyst. The sectors include: Basic Materials, Consumer Discretionary, Consumer Staples, Energy, Health Care, Financial, Industrials, Technology, and Utilities.

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**Availability**

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? Meetings typically last one to two hours. Lead sector analysts are usually only required to meet on a bi-weekly basis. Meeting times are decided by officers but the schedules for all student managers will be considered. Yes \_\_\_\_ No \_\_\_\_

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 time for research, analysis, and writing reports. Yes \_\_\_\_ No \_\_\_\_

Given advance notice, are you willing to attend any SMILE Fund events (including making a presentation to the UC Foundation Board on an annual or semi-annual basis)? Yes \_\_\_\_ No \_\_\_\_

Are you willing to make a commitment to participate in the SMILE Fund for three full semesters (Spring 2015, Fall 2015, and Spring 2016) and on a very limited (online) basis during the summer (Summer 2015)? Yes \_\_\_\_ No \_\_\_\_

**Personal Statement**

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.

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Do you have a resume? Yes \_\_\_\_ No \_\_\_\_

If yes, please email or include it with your application. If no, do not be worried. Many sophomores and juniors have not experienced many real opportunities to create or enhance their resumes. The SMILE Fund is wonderful opportunity to improve your resume and impress future employers.