



## Student Managed Investment Learning Experience (SMILE) Fund

*Sponsored by 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 Director, **Dr. Hunter Holzhauser** at [hunter-holzhauser@utc.edu](mailto:hunter-holzhauser@utc.edu). Or you may print out the completed form and **hand deliver it to** Shari Kappel the Administrative Assistant for the Finance & Economics Department, in Fletcher Hall, Room 434.

If you have any questions, please contact Dr. Hunter Holzhauser via email. Appointments can be set up if necessary.

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

**Due Date: Oct. 15, 2020 by 4 p.m. EST**

#### 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

Expected Graduation Date

*\*Attach copy of current My Mocs Degree with your application.\**

### Work Experience

*\*If you have a resume, please attach it with your application.\** If not, do not be worried. Many freshmen, sophomores, and even juniors have not experienced many real opportunities to create or enhance their resumes. The SMILE Fund is a wonderful opportunity to improve your resume and impress future employers.

Do you have a resume? **Yes**                      **No**

### Career/Professional Goals

General goals or industries

Specific careers or designations

Additional education goals

### 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.

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**

Are you interested in one of the five Chief Analyst positions? These positions include Chief Analyst of Industrials Team, Chief Analyst of Consumer Team, Chief Analyst of Health & Wealth Team, Chief Analyst of Energy Team, and Chief Analyst of Tech Team. **Yes**                      **No**

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, Information Technology, Communication Services, and Utilities.

### 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 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 need 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 2021, Fall 2021, and Spring 2022) and on a very limited (online) basis during the summer (Summer 2021)? **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.