

**Application for Student Managed Investment Fund**

*Barry University*

*Student Managed Investment Fund*

[*www.barry.edu/smif*](http://www.barry.edu/smif)

PLEASE WORD PROCESS *(All information is completely confidential.)*

Full Name:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Local Address:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Local Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   E-Mail:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Major:  : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Minor (if applicable) : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Anticipated Graduation Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Student ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year (undergraduate student applicants) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year (graduate student applicants) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

SMIF has three membership categories. Please indicate the membership category you are applying for by circling the relevant number below:

1. Apprentice Membership for first year students and sophomores;

1. Regular Undergraduate Membership for qualified undergraduate students;
2. Regular Graduate Membership for qualified graduate students.

SMIF is organized into four interrelated departments. Please indicate the department in which you are seeking to serve by circling the relevant number below:

1. ***Investment Research and Portfolio Management***

This department is responsible for all aspects of the investment research and management of the SMIF portfolio. It is the experiential learning part of SMIF

1. ***Service Learning***

This award-winning department is responsible for all aspects of teaching the financial literacy program conducted in collaboration with William H. Turner Technical Arts High School, and working in collaboration with the Dr. Mark and Olga Walker Community Foundation.

1. ***Operations***

This department is responsible for the effective and efficient operations of SMIFs non-investment functions.



List the relevant courses that you have taken so far (Course name and number, semester, and grade)

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| --- | --- |
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|  |  |
|  |  |

List current class schedule:

|  |  |
| --- | --- |
|  |  |
|  |  |
|  |  |

Current GPA in Major: \_\_\_\_\_\_\_\_\_\_

***For Graduate Student Applicants only to SMIF***

Name of Undergraduate University \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Degree and Year Received \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Major and GPA \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**All applicants**. Please answer the following questions.

 1. Why do you want to be a member of the SMIF?

 2. What can you contribute to SMIFs continued success?

 3. Attach a current resume, and an **unofficial** copy of your undergraduate transcript. This can be obtained by logging onto web advisor.

4. SMIF requires a commitment of time and effort. Do you have *at least* 5 hours to commit to SMIF per week?

 5.   If you were assigned $5,000 to invest, what investment(s) would you make? Briefly explain your choice.

For any further information feel free to contact us at barry.smif@gmail.com

Your signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_