



Finance 491: CFA Investment Challenge Application for Admission

Course Description: A team of up to five students will conduct an in-depth valuation assessment of a publicly traded, North Carolina corporation. The UNCW student team will compete against other North Carolina Universities, and the North Carolina competition is part of a global competition sponsored by the CFA Institute.

The work for the project will span both the Fall and Spring semesters, and students will be registered for a three-semester hour FIN 491 during the Spring semester. The course will be counted as 400-level concentration elective within Finance or Economics, per student preference.

Students first develop skills to value a publicly trade equity security. On approximately October 1, students will receive the name of the subject company and soon thereafter are required to visit the company, accompanied by the instructor, for a meeting. For the remainder of the Fall semester, students work as a team but independent of the instructor to conduct their valuation. Specific deliverables will be due to the instructor every two weeks to confirm progress. The written report (approximately 30 pages) is due at the end of the Fall semester.

During late January, the written report is submitted to the North Carolina CFA Society for judging. Student teams that develop the four top-scoring reports will be invited to State Finals to present and defend their research orally in late February. This event is mandatory for team members and typically requires a Friday night stay in Greensboro prior to a Saturday event. The winning team for the State of North Carolina will be required to travel to National Finals during April. Global Finals occur in either April or May. Students do not incur the normal expenses of these required trips.

If the UNCW team's report does not qualify to advance to State Finals, the instructor will create a panel of judges to conduct a similarly rigorous presentation and defense in Wilmington, at approximately the same time that the State Finals are being conducted.

Course Admission: Outstanding students may apply for admission to this course; admission is competitive, and an interview will be conducted. In general, students must be admitted to the Cameron School of Business, generally will be pursuing a finance concentration (but other concentrations will be considered), and must commit to being on campus for both semesters of the academic year in which the competition is taking place.

Please submit your application via email to Dr. William Sackley (sackleyw@uncw.edu). Interviews typically occur between the end of March and the first half of April.

Application

Last Name:

First Name:

Middle Initial:

Student ID:

University email:

Expected Graduation Date:

UNCW GPA (see degree audit):

CSB GPA (see degree audit):

Total Semester Hours of Credit Completed:

Transfer Credits:

Finance Courses Taken and Grade Earned:

Finance Courses	Grade Earned

Please mention any *honors* received, *scholastic achievements* attained, *leadership posts* held, and *activities* pursued at UNCW:

Please briefly state your reasons for applying to the CFA Investment Challenge team.

A significant difference between this project and other classes is the requirement to be able to function effectively independent of the instructor. What evidence exists that you can accomplish this?

Finally, what skills do you expect to bring to the team that will be valued?