



Opus College of Business



***Applications are being accepted for the 2010-2011 FINC 717 Investment Fund Management Class, i.e. The Aristotle Fund. All materials must be submitted by March 30 for consideration.***

## **Aristotle Fund Background**

The Aristotle Fund is a student-managed investment fund, and the unique learning vehicle for the UST MBA elective course FINC 717: Investment Fund Management. It provides finance-focused St. Thomas full-time and evening MBA candidates with an exceptional hands-on experience – managing a \$2 million investment fund.

This class was made possible by a generous gift from an anonymous donor to St. Thomas. The donor made their gift to the university intending the money be actively managed by graduate business students. The students act as investment managers for this designated piece of the university's endowment, now called the UST Aristotle Fund.

Every year a new group of graduate students from the Opus College of Business is selected to manage an ongoing portfolio of equity securities, incorporating new stocks and divesting others within the context of their policy mandate. The student managers base their decisions on research, visits with corporate management, and various investment management services. In addition, the students are responsible for a variety of communications pertaining to the performance of the fund, including Aristotle website updates and an annual report.

The fund is currently operated as a mid-cap equity blend, and is overseen by a UST board of advisors, an array of qualified financial professionals working as individual student mentors, and a managing professor, Dr. Mary Daugherty, Associate Professor of Finance.

The Aristotle experience provides students with “real” money to manage and requires serious dedication, focus, and time commitment. The students selected for this course will inherit the investment portfolio from the current year's class on September 1, 2010 and will be responsible for the performance of the fund until August 31, 2011.

The class meets weekly throughout the academic year including J-term, and some students will continue to meet weekly over the summer to manage the fund. Students selected this spring for the 2010-11 year will be encouraged to observe the current year's class over the summer to prepare for ownership of the portfolio.

While the Aristotle students do not take home any portfolio profits, they will gain strong research, analytical, and presentation skills while working directly with accomplished leaders in the Twin Cities investment community.

## Application Requirements/Process

The course is limited to a maximum of fourteen students and admission to the Aristotle program is highly competitive. Applicants must be current UST MBA students in good standing, and have the following prerequisite coursework:

- FINC 600: Financial Management
- FINC 713: Investments (full-time MBA students may take concurrently with the Aristotle course)
- ACCT 705: Financial Statement Analysis (required for full-time UST MBA students only)

Interested students must submit the following required application materials by March 30 to be considered for the Aristotle team beginning September 1.

- A letter establishing your personal and professional objectives in working with this fund.
- Two letters of recommendation; one must be from a UST faculty member.
- A copy of your current professional resume.
- The selection committee will obtain and review your UST transcript and other academic information.

Please email your letter and resume as attachments to [Aristotle@stthomas.edu](mailto:Aristotle@stthomas.edu). Please include your legal name and UST student ID number in the header of your letter. Your references should email their confidential letters directly to us, allowing them to be honest and forthright in their feedback.

The selection committee will invite strong candidates to a personal interview in April. Those students selected to participate will be notified in early May.

## Questions?

To learn more, we invite you to visit the Aristotle website:

<http://www.stthomas.edu/business/academicdepts/finance/aristotlefund/default.html>

For questions regarding the Aristotle Fund program or the application process, please contact:

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