

Undergraduate Student Investment Fund (USIF)

Center for Investment Studies
USC Marshall School of Business

Application

2025-2026 Academic Year

Please email your completed application, and attachments in ONE PDF file to investment@marshall.usc.edu by 5pm on Friday, February 28, 2025

First Name _____

Last Name _____ Student ID # _____

Email Address _____ Phone # _____

Current Address _____

Current Degree Program _____

Major _____ Minor _____ Expected Graduation Date _____

College(s) Attended (Please list the most recent enrollment first, including USC)

School Name	From	To	Cum. GPA	Major GPA	Degree
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Finance, Economics & Accounting Courses Taken (Including current semester)

Course Name	Course Code	Date Completed	College	Grade Received
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Two semester commitment: USIF is a two-semester class (Fall and Spring). Students who enroll in the class are required to participate during both semesters. Can you commit to enrolling in both the Fall and Spring? Yes

Additional commitments: Can you commit to all of the following: Yes

1. Attend a special class meeting during the transition period TBD during **April 2025** to receive training and preparation for assuming full fund management responsibilities.
2. Maintain at least a 3.30 GPA.
3. Attend and support the USIF 2025 Annual Meeting (April 2025), and attend the USIF 2026 Annual Meeting.

Prerequisites: Prior to enrolling in USIF, students are required to complete Financial Analysis and Valuation (FBE 421). Will you meet this requirement? Yes

Availabilities for Interview(s): Indicate your availability during the following periods for potential interviews

The week of March 3 – March 7, 2025: _____

The week of March 10 – March 14, 2024: _____

Read, sign and date the following statement:

I certify that the information provided herein is complete and accurate I authorize the Faculty instructor and members of the USC Undergraduate Student Investment Fund to make reasonable inquiry regarding my application. I understand that falsifying or withholding information in completing this application constitutes grounds for immediate withdrawal of my application from consideration, and cancellation of my enrollment in the course.

Signature of Applicant: _____

Date: _____

Attachments (Please include the following with your completed application; double space your personal statement):

1. A copy of your resume.
2. A personal statement (750 word maximum). In one page, explain why you are interested in the USIF and how working as a USIF manager would contribute to your career objectives in one page. In another page, explain your unique skill sets and how you can contribute to the USIF program.
3. A write up on how you would approach generating a stock pitch or investment idea (250-500 words). What would your screening process look like? What information would you want to analyze, and how would you ultimately determine a buy or sell recommendation? Note: You do not need to actually pitch an investment idea.

Requirements (Candidates must demonstrate the following qualities):

To be eligible, students must currently be enrolled in the USC Undergraduate Program, be in good academic standing with a minimum cumulative 3.0 GPA at the time of application, and plan to graduate no earlier than spring semester following selection for the program. All applicants are also required to have successfully completed Business Finance (BUAD 306). Prior to enrolling in USIF, undergraduate students are required to complete Financial Analysis and Valuation (FBE 421).

Important qualities for selection in the class include:

1. High intellectual curiosity.
2. Serious commitment in the areas of asset management and/or investment banking.
3. Excellent verbal and written communication skills.
4. Outstanding leadership and teamwork skills.
5. Highly professional demeanor.

Selection Process:

The Recruiting Committee will review your application and make recommendations for first round interviews (up to 30 minutes), which will be conducted by the USIF 2025 managers. **In this interview, all applicants will be asked to walk through a short case study involving an investment idea and provide their feedback. Supporting documents will be provided to applicants before the interview, and interviewees will be expected to be familiar with these materials.** In the second round, the USIF instructors will meet with the final candidates for a 20 minute interview. The USIF instructors will consult with an ad hoc faculty committee before the final selection is made. The final class list will be announced before March 31, 2025.

About USC Marshall Undergraduate Student Investment Fund (USIF):

The USIF Program is the capstone practicum component of the USC Marshall School of Business' Undergraduate Investment Management degree program.

The educational goals of the course are to give students theoretical training in asset management, experiential financial analysis and valuation, asset allocation, hands on decisions managing real capital, and involvement with the operational aspects of running a professional investment management advisory firm.

The USIF seeks to maximize the value of its assets under management subject to reasonable risk parameters, while operating in accordance with the investment policies as prescribed by the University Investment Committee.