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## ***The 2nd Annual Cornell Investment Portfolio Case Competition***

Organized by Cornell's Parker Center for Investment Research,  
Johnson Investment Management Club, and Cornell Financial Engineering Manhattan (CFEM)

**Friday, March 2nd, 2018 | Cornell Tech Campus, Roosevelt Island, NYC**

The **Cornell Investment Portfolio Case Competition** is an intercollegiate portfolio design competition, offered to create awareness of portfolio management careers and facilitate students' networking and recruiting opportunities in the field with sponsoring firms. The competition is designed to promote analysis and investment strategy development in private wealth, retirement and endowment/foundation asset management and portfolio construction and risk management.

Each school will send a team of 3-4 1<sup>st</sup>-year and 2<sup>nd</sup>-year graduate students to present their investment case analysis and portfolio recommendations to attending judges and recruiters from sponsoring firms. Students will have one week to research the case, will make a 10-minute presentation and respond to 10 minutes of questions, and are required to provide a 2-page summary to judges.

Time will be set aside for career coffee chats and resume books of participating students will be distributed to sponsoring firms.

**Why Students Should Participate:** Compete in a unique investment challenge that is ***different than popular stock picking and pitching competitions***. Experience the intensity, depth, and breadth of questions posed by top investment professionals - the kinds of questions asked daily in the investment business. Network with investment industry professionals - IPCC judges, sponsors, and competitors who will soon enter the investments field. Practice creative analyses and prepare concise, compelling presentations.

**Who Should Participate:** 1<sup>st</sup>/2<sup>nd</sup>-year MBA and finance master's students interested in ***pursuing careers in investment management*** and are preferably still looking for internship or permanent employment opportunities. This competition is ideal for students interested in portfolio construction and management.

**Recommended Selection Process:** We encourage schools to distribute information about this event broadly on campus, particularly to the investment clubs, and hold internal competitions to determine their teams. ***Two teams from one university may apply***, and may be selected to attend as long as 1) members of the teams attend different programs, 2) each team has a maximum of two 2<sup>nd</sup>-year students, and 3) there is sufficient space.

### **2018 Case: Defined Contribution Plan Design** **First Prize \$1000, Second Prize \$500**

#### **DATES**

- January 25<sup>th</sup> : Informational Meeting Webinar via ZOOM, 4:30 PM – 5:30 PM EST. **A link to the webinar recording is available [here](#).**
- February 10<sup>th</sup> : Applications due
- February 22<sup>nd</sup> : Case distributed online
- March 2<sup>nd</sup> : Case Competition – 11:00 AM to 6:30 PM

**FOR MORE INFORMATION** including information about last year's competition, go to:

[www.johnson.cornell.edu/Parker-Center-for-Investment-Research/Investment-Portfolio-Case-Competition](http://www.johnson.cornell.edu/Parker-Center-for-Investment-Research/Investment-Portfolio-Case-Competition)

# Cornell Investment Portfolio Case Competition Application Form

**Team Application Form:** In one page or less (normal font, single space), please describe your team's background and why you would like to participate in this year's IPCC. Also describe how your team might approach the case to arrive at your proposed solution. Include your response with this form and all resumes.

Date of application: \_\_\_\_\_

School: \_\_\_\_\_

Please attach resumes for all team members; these will be compiled into a resume book for the event's sponsors.

Team Members:	Graduation Month/Year	Degree Program	Email	Phone Number of team leader
1) _____	_____	_____	_____	_____
2) _____	_____	_____	_____	_____
3) _____	_____	_____	_____	_____
4) _____	_____	_____	_____	_____

Backup Team Members:

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_

E-mail completed applications to **Ming Chou** ([mcc287@cornell.edu](mailto:mcc287@cornell.edu)) and **Cathy Wetterer** ([cjw7@cornell.edu](mailto:cjw7@cornell.edu)) by **February 10, 2018**. Accepted teams will need to pay a registration fee of \$100 due February 22, 2018.

Please make checks payable to "Cornell University" with a note in the memo line "2018 IPCC New York", and mail checks to Cathy Wetterer, 235 Sage Hall, Ithaca, New York 14853.