

Student Finance Association Bond Fund Committee Application

Fall 2009 semester for SFA could go down as the biggest semester thus far in SFA history. We have many great events, speakers, and socials planned for this semester. This is also a key semester for the student run fixed income fund that will help dictate the strategy for the fund for next year and years to come for investing.

The responsibility for this semester's committee will include investment strategies, creating a historical data source for future committees, and end of the year presentation of the position of the fund to SFA at the annual meeting. Also the members chosen for this semester's fund will be coming back next year and hopefully have interest in becoming next year's Bond Fund Manager.

Our goals for this semester are vast goals. One, construct investment opportunities in high yield to maturity bonds with high coupon payments that are investment grade bonds. Two, the bonds in our portfolio have a short term ladder strategy to help offset risks over time and the bond fund will be more actively managed. Three, to create a historical data source that will help the committees of the future understand past performance of the fund and know where to find the best data source of bonds available in the market. Lastly, to help them understand the illiquid market that bonds can be and the difficulty buying them with limited funds.

Name:

Year: FR SO JR SR 5TH GR

Major(s):

Finance courses taken (Please put "X" for completed, "E" for currently enrolled)

Principles of Finance ____ Equity ____ Debt ____ Intermediate ____ Cases ____

Security Analysis ____ Other Finance Electives (Please list) _____

1) Please describe your current and past involvement in SFA. What do you anticipate or hope to do in the future with SFA?

2) When looking at fixed income securities what kind of investments seem striking to you as an investor? Are there any strategies that you use or that you know of that would help us in this semester's bond fund committee?

3) What are you hoping to gain by being on the Bond Fund Committee?

4) In what ways do you plan to contribute to this committee? What skills do you bring to this committee that will assist us to achieve our goals?

If selected I understand that I must attend all Bond Fund meetings unless excused by the Bond Fund Chairman. Also must be current on all SFA membership dues.

(Signature)

Zac Sobba
Bond Fund Chairman