To: **BCF APPLICANTS**

**From:** PATRICK GREGORY

Faculty Director of the Babson COllege FUnd

Subject: Babson College Fund Management Application

Date: SPRING 2024

The Babson College Fund hereby solicits applications for students to serve as Babson College Fund Managers for the **2024-2025 academic year**. The program accepts MBA, MSF and undergraduate students, subject to the prerequisites and requirements detailed below. Applications are due at **MIDNIGHT on WEDNESDAY, MARCH 6th.**

**About the Babson College Fund Program:**

The Babson College Fund (BCF) is an academic program in which selected students manage a portion of the Babson College endowment. The current value of funds under management is approximately $5 million. BCF managers are overseen by Faculty Director Patrick Gregory and Executives-In-Residence who are industry professionals. The program seeks to provide a rich educational experience through the development of investment research skills and the acquisition of portfolio management experience. These skills and experience are highly valued by employers in the investments industry. Prior BCF managers have secured employment as investment professionals at Goldman Sachs, JPMorgan, UBS, Rothschild, Credit Suisse, Fidelity, Wellington, HarbourVest, and other firms.

The Babson College Fund program is for highly self-motivated individuals with a strong interest in finance and investments. Participation requires a two-semester commitment. BCF managers must enroll in the Babson College Fund course (FIN4520 and FIN4521 for undergraduates and FIN7572 for MBA students) in both semesters of their participation year. The courses must be taken for credit and a grade.

Throughout the year, the full management team meets once a week (currently scheduled for **Tuesdays from 6:30 p.m. to 9:00 p.m.**). During the weekly meetings, managers review the fund's performance, present their research and stock picks, conduct organizational business, and discuss issues and topics related to the management of the fund. Faculty Director Patrick Gregory and the Executives-In-Residence give feedback and guidance, answer questions, and provide instruction on investment related topics on an as-needed or requested basis. Throughout the year, BCF managers are given opportunities to meet with investment industry professionals, both at Babson and at professional events.

Grades are based on: the quality and quantity of research; ability to manage the sector versus the sector benchmark, and the portfolio performance; professionalism; faculty, executives-in-residence and peer-evaluations; and a final sector presentation. The class is case-based teaching -- the case being the actual management of real money. It is not a lecture course and is not a substitute for the Equities (FIN 7503) class or other finance courses.

The BCF portfolio is managed primarily as a fundamental long-short fund. Management policy is subject to guidelines set by the Board of Trustees through their Investment Committee. At the direction of the Trustees, the portfolio is equity-only and should be fully invested. The students conduct intensive fundamental and quantitative research to identify stocks that are attractively priced at their current market values. Students are encouraged to call or visit companies, suppliers, and customers, and conduct primary research aimed at gaining superior insights into each company's future performance. Stocks are pitched to the group.  If selected for the portfolio, the analyst pitching the stock and his or her team members must recommend the position size.  Executive Portfolio Managers monitor the fund's performance and sources of risk, aiming to keep risk and tracking error within targeted bounds. Managers budget the allowable risk to the active positions expected to add the most value. The Fund’s objective is to outperform the benchmark on an absolute and risk-adjusted basis.

It takes an extraordinary amount of time and effort to add value to an equity investment portfolio. This program will require more effort than any other course you will take at Babson. The most successful students typically work a minimum of 10-15 hours per week researching portfolio holdings and other companies in their coverage universe. At times, students have found it necessary to work 20-40 hours per week to prepare for an upcoming stock pitch. Yet, despite the heavy workload, alums often note that the course was one of their most valuable and rewarding experiences because of the practical experience gained over the two semesters.

The BCF team has 20-25 student members, divided into sub-teams. There is an Executive Portfolio Manager(s), a Quantitative/Risk Management team, and a team for each equity sector: Communication Services, Technology, Consumer Staples, Consumer Discretionary, Energy/Materials, Industrials, Healthcare, and Financials/REITs. The Quantitative/Risk management team conducts risk management, optimization, and attribution analysis, fund accounting and reporting. The Executive Portfolio Manager manages the organization and is responsible for running meetings, coordinating the teams, placing trades, and monitoring compliance of trades and holdings, among other responsibilities.

**Eligibility Requirements:**

* 1. A minimum commitment of two semesters is required.  The new managers will serve from **September 2024 to May 2025.**
	2. MBA and MSF students must have completed FIN7503 (Equities) or plan to take it concurrently during the **first semester** of their BCF year.
	3. Undergraduate students must have completed FIN3520 (Security Valuation).

**Responsibilities of Managers:**

BCF managers are expected to:

* master the investment management tools and databases available in the Cutler Center;
* conduct extensive equity research and analysis;
* select stocks based on disciplined research;
* draft detailed research reports to support their stock pitches;
* present their research to the Babson College Fund as well as at investment-related conferences
* continually refine their presentation skills
* conduct analysis to determine the optimal portfolio weights for the securities held;
* monitor, evaluate, and rebalance the portfolio as necessary;
* distribute quarterly reports for portfolio holdings;
* draft reports detailing fund performance;
* participate in outreach efforts;
* represent BCF in investment and portfolio management-related competitions
* attend weekly meetings of the BCF portfolio management team;
* attend seminars on equity analysis and portfolio management, which will be presented by the Faculty Advisor;
* actively participate in the BCF seminars and networking events;
* attend area events for investment professionals wherever possible. Qualifying events include analyst conferences sponsored by brokerages, and speaker events hosted by CFA Society – Boston or the Cutler Center.

**Application Procedure and Selection Process:**

To apply, interested students must complete the application cover page form and all required materials detailed below. A completed application packet must be submitted by **MIDNIGHT on WEDNESDAY, MARCH 6, 2024.** This is a **firm deadline**, and there will be **no exceptions**.

To submit your application, please complete the form linked below and upload your application in ONE PDF file using the following naming convention: LastName\_FirstName\_Application.PDF

[**BCF APPLICATION SUBMISSION FORM**](https://forms.office.com/Pages/ResponsePage.aspx?id=1yo96M07XE2dbG_6GkQ0v1SLhflfs8NIl8jmEfpjukRUMVE2VDJZWTU4WjRKQkpKSkcxVDFDU0VNSi4u)

Students will be invited for a 20-minute interview to be conducted by Faculty Director Patrick Gregory, the Executives-in-Residence and students currently in the program. At this interview the candidate should be prepared to discuss his or her education, experience, commitment, and philosophy relating to investment management. Evidence of demonstrated interest and commitment are highly valued. Recommendation of a stock is strongly encouraged. Following the interviews, the Faculty Director and BCF Executives-in-Residence will select the student managers, and their decisions are final.

The interviews will be held in-person or virtually via WebEx. If interviewing virtually, please ensure that you have a working camera and microphone.

**Application Materials:**

* Completed application typed cover page.
* A list of all courses and *related grades* in finance, accounting, economics, and mathematics taken since graduating high school. Please include the semester each course was taken, along with the name of instructor. Also include any courses in progress.
* Complete resume, indicating all current and previous schools attended since high school, employment, and extracurricular activities.
* An essay, double-spaced, describing the candidate's experience, commitment, qualifications, and investment philosophy. Applicants are encouraged to cite concrete examples of interest in investment research and management, such as past investments, prior employment experience, and reading of related books and publications. The essay should rank and explain your preferences for which sub-team you wish to join. Maximum length of the essay is 800 words.
* Babson transcript (your unofficial Babson transcript from the portal is acceptable).
* Either a) official transcript(s) from other colleges or universities attended, or b) unofficial transcript (including photocopies) accompanied by a letter from you agreeing to provide an official transcript should you be accepted to the program.
* Two letters of recommendation, **one must be from a Babson Finance Faculty member** (assuming that you’ve completed a finance course)\*. Letters, written on the forms provided in the application, should be emailed directly from the recommender to Leslie Romiza, Program Manager, Cutler Center at lromiza1@babson.edu. The second letter of recommendation can be from Babson faculty, faculty at prior colleges or universities, or from work supervisors. Two forms are included in this packet. The first form can be used by any Babson faculty; the second form can be used by an external recommender.
* Completed & signed FERPA Authorization to Release Information form, located at the end of the packet, which protects student confidentiality. By signing this form, you agree that college personnel may provide information from your education records for the purposes of applying to the BCF program.

**Additional Information:**

***If you need clarification on these application instructions, please review the Frequently Asked Questions on the next page. If you don’t see an answer to your question, contact Leslie Romiza, Program Manager, Cutler Center at*** ***lromiza1@babson.edu******.***

\*Some students may not have taken a course with a finance faculty member yet (such as incoming One-year MBAs). In such cases please provide a recommendation from a Babson faculty member in a related department (Accounting, Economics, etc.) If students have not taken a course with a faculty member yet (such as incoming MSF), please provide a recommendation from a faculty member at your previous college or university in a related department (Finance, Accounting, Economics, etc.)

*Frequently Asked Questions*

*Question:* I’m an incoming MBA or MSF student and new to Babson. I don’t have a letter of recommendation from a Babson faculty member. What should I do?

*Answer:* Since you are new to Babson, please submit a letter of recommendation from faculty at your previous college or university (preferably a finance or accounting course) or a from a work supervisor.

*Question:* On the non-faculty letter of recommendation form, what does the recommender need to submit?

*Answer:* The recommender can complete the form, but are also welcome to include a formal letter of recommendation if they would like to provide more details, either to supplement the provided form or as a standalone letter and forego the provided form.

*Question:* I applied last semester and wasn’t accepted. Can I apply again? Do I need to resubmit my application?

*Answer:* Yes. If you have previously applied, you must submit an updated application packet, but can use the same letters of recommendation from the previous application. When submitting your application packet please confirm via email whether you would like to carry over your previous recommendations.

*Question:* I’m studying abroad this semester. Can I still apply?

*Answer:* Yes. If you’re studying abroad, you can still apply for the program. Please note that the application must be submitted on time and interviews will be conducted via WebEx.

*Question:* If I plan to go abroad in the upcoming academic year can I still apply?

*Answer:* BCF requires a two semester commitment of which there are no exceptions. You must be able to commit to two consecutive semesters in the program.

*Question:* If I have not taken FIN3520 (Security Valuation) or FIN4530 (Investments) can I still apply?

*Answer:* On rare occasions a student may be considered before taking Security Valuation or Investments if the student has completed the core modeling content in Wall Street Prep and obtained the Wall Street Prep financial modeling certificate, in addition to having developed relevant skills through an internship experience or co-curricular activities. In those cases, the student must take FIN 3520 (Security Valuation) or FIN 4530 (Investments) concurrently in their first semester of their BCF year. If you would like to request access to WSP, please reach out to Leslie Romiza, Cutler Center Program Manager at lromiza1@babson.edu.

**Babson College Fund**

**Application Instructions**

Instructions for Delivery:

**To submit your application, please complete the form linked below and upload your application in ONE PDF file using the following naming convention: LastName\_FirstName\_Application.PDF**

**[BCF APPLICATION SUBMISSION FORM](https://forms.office.com/Pages/ResponsePage.aspx?id=1yo96M07XE2dbG_6GkQ0v1SLhflfs8NIl8jmEfpjukRUMVE2VDJZWTU4WjRKQkpKSkcxVDFDU0VNSi4u)**

The .PDF must be received with the pages in the following order:

1. **Typed application form**(the next page of this document, completed)
2. **List of finance, accounting, economics, and mathematics courses taken and corresponding grades received.**
3. **Resume**
4. **Essay**
5. **Transcript(s) from Undergraduate and Graduate Institutions** (as applicable)

*Please note, your unofficial Babson transcript is acceptable for the application\*. Please make sure the transcript includes the course number, course title, instructor name, number of credits and grade. For new students (e.g. One Year MBAs), we realize that you might not yet have any grades, this is ok, please submit your transcript as it appears online.*

1. **Babson College Faculty Member Authorization to Release Information Form:** The FERPA Authorization to Release Information form, located at the end of the packet, protects student confidentiality. By signing this form, you agree that college personnel may provide information from your education records for the purposes of applying to the BCF program.

**Please have the following submitted by recommenders:**

1. **TWO Recommendations**: **one must be from a Babson Finance Faculty member**. Letters, written on the forms provided in the application, should be emailed directly from the recommender to Leslie Romiza at lromiza1@babson.edu. The second recommendation letter can be from Babson faculty, faculty at prior colleges or universities, or from work supervisors.

**Your complete application must be submitted in its entirety** (except for the recommendations, which come directly from your recommenders). **Incomplete applications with missing information will not be accepted.**

Completed applications must be submitted through the [**BCF APPLICATION SUBMISSION FORM**](https://forms.office.com/Pages/ResponsePage.aspx?id=1yo96M07XE2dbG_6GkQ0v1SLhflfs8NIl8jmEfpjukRUMVE2VDJZWTU4WjRKQkpKSkcxVDFDU0VNSi4u)and timestamped no later than **MIDNIGHT on WEDNESDAY, MARCH 6, 2024.**

An email will be sent to applicants shortly thereafter to schedule an interview for the week of March 25, 2024.

***If you need clarification about the application process, please contact*** ***Leslie Romiza******, Cutler Center Program Manager.*** ***Only electronic submissions (email) are accepted.***

**Babson College Fund**

**Cover Page for Spring 2024 Application**

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Cell phone number\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

LinkedIn Profile\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Babson program (circle one): Undergraduate MBA 2-year program MBA Evening

 Blended Learning MBA MBA 1-year program MSF Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Expected graduation date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­­

Name, and title, of one Babson Finance Faculty Recommender\*\*:

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Name, title, organization, and telephone number of recommender #2:

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Undergraduate major and GPA (overall GPA, not just for major) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Undergraduate college\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Babson MBA program GPA (to date) \*\*\*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other academic programs attended, and GPA achieved\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Students admitted to the program are assigned to one of the following teams: Executive PM, Consumer Discretionary, Consumer Staples, Healthcare, Technology, Communication Services, Industrials, Materials/Energy, Financials/REITs, and Quant/Risk Management. Please list your top 3 preferences:

Most preferred team: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Second most preferred team: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Third most preferred team: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\*By submitting this form, I authorize the BCF program staff to verify the accuracy of the transcripts I have submitted with my BCF application. If I am accepted to the BCF program, I promise to provide an official transcript from my undergraduate and/or graduate institution(s) if requested.

\*\*Some students may not have taken a course with a finance faculty member yet (such as incoming 1-year MBAs), please provide a recommendation from a Babson faculty member in a related department (Accounting, Economics, etc.).

\*\*\*New students (such as incoming 1-year MBAs), may not have any GPA information at this point. If you do not have a Babson GPA, please leave this line blank.

**BCF Student Recommendation Form for Babson College Faculty**

To the Recommender:

Thank you for agreeing to serve as a reference for a Babson College Fund applicant. This form was designed to help facilitate gathering your feedback and evaluation. Please attach additional sheets as necessary. **The deadline for all application materials is MIDNIGHT on WEDNESDAY, MARCH 6, 2024.**

**Please email the completed evaluation by MIDNIGHT on WEDNESDAY, MARCH 6, 2024 to:**

Leslie Romiza, Cutler Center Program Manager at lromiza1@babson.edu

|  |  |
| --- | --- |
| **Faculty Member Name:**  |  |
| **Division & Course Name:**  |  |
| **Date:** |  |

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Student** **Name** | **Rating 0-10 (10=best)** | **Key Comments on Student** |
| **1** |  |  |  |
| **2** |  |  |  |
| **3** |  |  |  |
| **4** |  |  |  |
| **5** |  |  |  |

Babson College Fund

Recommendation Form

To the Recommender:

Thank you for agreeing to serve as a reference for a Babson College Fund applicant. This form was designed to help facilitate gathering your feedback and evaluation. Please attach additional sheets as necessary. You may submit this recommendation via email in pdf format. The deadline for all application materials is **MIDNIGHT on WEDNESDAY, MARCH 6, 2024.**

**Please email the completed evaluation in .PDF format to:**

Leslie Romiza, Cutler Center Program Manager

email: lromiza1@babson.edu

The Babson College Fund (BCF) is an academic program in which selected students manage a portion of the Babson College endowment. The current value of funds under management is approximately $5 million. Professor Patrick Gregory and Executives-In-Residence, who are industry professionals, direct the program. The program seeks to provide a rich educational experience through the development of investment research skills and the acquisition of portfolio management experience. Additional information is available at: [invest.babson.edu](https://www.babson.edu/academics/centers-and-institutes/stephen-d-cutler-center-for-investments-and-finance/experiential-learning/babson-college-fund/)

The program is highly selective so your feedback is valued and appreciated. The information you provide will be used only for the purpose of selecting BCF managers.

The program seek managers who are intelligent, responsible, mature, highly self-motivated, willing to work hard, eager to learn, and who have demonstrated an interest in investments. Experience is not necessary, but is a consideration insofar as it demonstrates interest and dedication.

Name of Applicant \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please complete the name and address section, **or staple a business card over this section**.

Name of Reference \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Company or College\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Telephone number\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

With respect to all considerations, please rank the applicant’s qualifications for the BCF program on a scale of 1 to 10, 10 being most suitable:

1 2 3 4 5 6 7 8 9 10

(least qualified) (most qualified)

Relative to all students you have known, how highly do you recommend the student for a position in the BCF:

1 2 3 4 5 6 7 8 9 10

(least recommended) (most recommended)

Relative to other applicants you are recommending **this year** for the BCF, how highly do you recommend the applicant for a position in the BCF (please check “not applicable” if you are recommending only one student this year, or a ranking between 1 and 10 if you are evaluating more than one applicant):

Not Applicable

1 2 3 4 5 6 7 8 9 10

(least recommended) (most recommended)

Please comment on how well and in what capacity you know the applicant and the applicant’s qualifications for a position in the BCF:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Reference Date

**BABSON COLLEGE FACULTY**

**AUTHORIZATION TO RELEASE INFORMATION**

**Babson College**

The Family Educational Rights and Privacy Act (FERPA) protects student confidentiality by placing certain restrictions on the disclosure of information contained in a student’s education records. By signing this form, you agree that college personnel may provide information from your education records as indicated above.

Name of Student: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DOB: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |
| --- |
|   I, the undersigned, authorize Babson College to release the following education records  and/or any information contained therein (please identify specific records, types of records,  or indicate “all records”): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ To: Patrick Gregory, Babson College Fund Faculty Director and Babson College Fund Executives in Residence  For the purpose of:  *My application to the Babson College Fund* I understand and acknowledge that: (1) I have the right not to consent to the release of my education records; and (2) this consent shall remain in effect until revoked by me, in writing, and delivered to Babson College, but that any such revocation shall not affect disclosures made prior to the receipt of any such written revocation.  |

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Student’s Signature Date

PLEASE REVIEW, SIGN, AND INCLUDE THIS FORM IN YOUR COMPLETED APPLICATION PACKET. Please reach out to Leslie Romiza, Cutler Center Program Manager, at lromiza1@babson.edu with any questions.