

TCU HIGH SCHOOL INVESTOR CHALLENGE



Neeley School
of Business

Luther King Capital Management Center for Financial Studies
TCU Neeley School of Business
TCU Box 298530
Fort Worth, Texas 76129

neeley.tcu.edu/LKCM_Center/HSIC/

WHAT IS THE TCU HIGH SCHOOL INVESTOR CHALLENGE?

The TCU High School Investor Challenge is a unique program for high-achieving, motivated high school students who have a strong interest in investing in the stock market. The Challenge provides initial training in security analysis and portfolio management. To be eligible, you must be currently enrolled in high school and entering your senior year.

What happens at the High School Investor Challenge?

- Students selected for the program attend a six-day on-campus course in securities analysis (stock selection) and portfolio management. You will learn to access company data and analysts' reports on the Internet, and use TCU's online resources including Value Line to evaluate and compare companies. You will stay in TCU dorms throughout the week.
- Each student delivers periodic online reports July-March to security analysts for review, critique and execution of his/ her proposed portfolio decisions/stock trades.
- In April 2021, we invite all students to attend a celebration banquet at TCU to present your portfolios. Parents and family are invited to attend the banquet.

HOW TO APPLY

Complete the TCU High School Investor Challenge Application Form and return it to the TCU address below no later than **April 9, 2020**. Applications received by email or received after **April 11, 2020**, will not be processed. Your transcript, senior year schedule and recommendation may be mailed separately (email not accepted) by your school, but must be received no later than **April 9, 2020**.

Your application package will consist of:

- Completed application form
- Official high school transcript and senior year schedule
- Signed recommendation form from your high school counselor or teacher
- Signed statement of commitment by you and a parent supporting your participation in the program, if selected.

You must provide your contact information prior to mailing your application at

<http://neeley.tcu.edu/LKCM/Form.aspx?ekfrm=25403>

If you are selected into the program, you will be notified by email.

To be considered for the program, you must:

- Have completed the application process.
- Be able to bring a laptop to the program that has access to Microsoft Word and Power Point.
- Be entering your senior year of high school with a reasonable expectation of graduating in May or June 2021.
- Have a history and evidence of high achievement in your academic subjects.
- Have a high aptitude in math.
- Plan to continue your education after high school graduation.
- Be able and willing to commit to attend the summer program, May 31 - June 5, 2020, or June 14 - 19, 2020.
- Be able and willing to submit reports online during your senior year of high school.

TIMELINE

There will be two program offerings, May 31 - June 5 and June 14 - 19. HSIC A begins Sunday, May 31, 3:00 p.m., and ends Friday, June 5, 3:00 p.m. HSIC B begins Sunday, June 14, 3:00 p.m., and ends Friday, June 19, 3:00 pm. From June 2020 to March 2021 students will continue to buy and sell stocks to increase the risk-adjusted return of their portfolios. The portfolio management phase of the program ends at 3:00 p.m., Friday, March 26, 2021. Portfolio results will be reported soon thereafter. The celebration banquet will be held on Saturday, April 10, 2021, on the TCU campus.

PROGRAM COST

Cost is \$895 and covers room, board and program expenses. (We recommend that you bring a limited amount of spending money for entertainment and miscellaneous expenses while on campus.) The entire program fee and a refundable \$150 room security deposit are due no later than **30 days after notification** of acceptance into the program.

SELECTION

Students will be selected based on the information contained in the application. Areas of assessment include:

- Scholastic achievement
- Leadership
- Motivation and interest in investing in the stock market
- Unique competence or expertise

IF YOU HAVE QUESTIONS, PLEASE REFER TO THE FAQ TAB (http://neeley.tcu.edu/LKCM_Center/HSIC_FAQ/)

HOW TO CONTACT US

Mailing Address:

Luther King Capital Management
Center for Financial Studies
Neeley School of Business
TCU Box 298530
Fort Worth, Texas 76129

Physical Address:

Luther King Capital Management
Center for Financial Studies
Neeley School of Business
2932A Merida Avenue
Fort Worth, Texas 76109

Assistant: Charlotte Holliday

Program Coordinator: Barbara Wood

neeley.tcu.edu/LKCM_Center/HSIC/

Application

Application file is not complete until this evaluation is returned to TCU. This document does not become part of the student's permanent record at TCU. By submitting this evaluation, the applicant waives all access to the information contained within.

TCU HIGH SCHOOL INVESTOR CHALLENGE

STUDENT'S FULL LEGAL NAME _____

STUDENT'S PREFERRED NAME _____

STUDENT'S ADDRESS: STREET _____

CITY/STATE/ZIP _____

DATE OF BIRTH _____

Official Test Scores:

PSAT _____

SAT _____

ACT _____

Please indicate with an 'X' which program you would like to attend:

_____ HSIC A: May 31-June 5, 2020

_____ HSIC B: June 14-19, 2020

Admission is highly competitive. Only 40 students are chosen for each session. If not admitted to the session you selected above, would you like your application to be considered for the other session? Yes No (circle your response)

Parent's E-mail: _____

Student's E-mail: _____

Student's Phone: _____

High School Name: _____

Graduation Date: _____ Planned field of study in college: _____

Extracurricular activities, outside interests, hobbies, jobs: _____

Investing experience and/or statement of interest: (convince us that you have strong interest in investing in stocks) _____

How did you hear about the High School Investor Challenge? _____

Before submitting your student application package for the TCU High School Investor Challenge, please check to see that you have completed all requirements.

- I have read all instructions on the application form and understand the requirements for participation, including using my personal laptop during the week.
- I have completed the application form.
- I have included official Test Scores on the application for the SAT or PSAT or ACT (if available).
- I have included a copy of my senior year schedule.
- I have included a copy of my high school transcript.
- I have included my counselor's or teacher's recommendation.
- I have included my statement of commitment.
- I have included a statement of commitment from my parent(s).
- I have gone to <http://neeley.tcu.edu/LKCM/Form.aspx?ekfrm=25403> and filled out the Application Contact Info Form.

Notice of non-discrimination: TCU is committed to providing a positive learning and working environment free from discrimination and harassment. In support of this commitment, TCU prohibits discrimination and harassment on the basis of age, race, color, religion, sex, sexual orientation, gender, gender identity, gender expression, national origin, ethnic origin, disability, genetic information, covered veteran status, and any other basis protected by law.



**Neeley School
of Business**

TCU Box 298530
Fort Worth, Texas 76129
817-257-7788
FAX 817-257-7268

**STUDENT AND PARENTS' STATEMENT OF COMMITMENT TO
FULLY PARTICIPATE IN AND COMPLETE THE PROGRAM**

A maximum of 40 students will be selected to participate in the 2020 TCU High School Investor Challenge Program. Each competitive spot in the program is valuable because of its educational component and the opportunities it makes available to each student. **It is very important that the selected students attend all six days** and submit reports during all of the scheduled online reporting dates between June 2020 and March 2021. **Students participating in the program MUST bring a laptop for use.** The TCU High School Investor Challenge is a unique opportunity that we want to see fully utilized by the students who are chosen to participate. For that reason, we ask that each student applicant and a parent sign the following agreements.

Student's Agreement

I understand that the TCU High School Investor Challenge is a very valuable program offered at a price that is heavily subsidized by the Luther King Capital Management Center for Financial Studies in the TCU Neeley School of Business. If selected as one the students to participate in the program, **I agree to attend all six days of the summer program** and to fully participate in all of the planned activities during that week. I also agree to submit stock analysis reports monthly from June 2020 to March 2021. I understand that to be eligible for TCU college credit I must comply with this agreement.*

Agreed to by: _____ Date: _____
STUDENT'S SIGNATURE

Parent's Agreement

I understand that the TCU High School Investor Challenge is a very valuable program offered at a cost of \$895 by the Luther King Capital Management Center for Financial Studies in the TCU Neeley School of Business. If my son or daughter is selected as one the students to participate in the program, I agree that he/she will attend all six days of the summer program and that he/she will fully participate in all of the planned activities during that week. I also agree to see to it that he/she submits monthly reports between June 2020 and March 2021. I understand that to be eligible for TCU college credit, my son or daughter must comply with this agreement.*

Agreed to by: _____ Date: _____
PARENT'S SIGNATURE

PLEASE SUBMIT YOUR COMPLETED APPLICATION TO THE ADDRESS BELOW:

Texas Christian University
Neeley School of Business
LKCM Center for Financial Studies
TCU Box 298530
Fort Worth, Texas 76129

****Students who enroll at TCU for their freshman year and who have completed the TCU High School Investor Challenge and submitted a minimum of 7 stock reports, may receive credit for a 3-hour Finance seminar class, pending university approval.***