

Student managers to present Student-Managed Endowment Fund annual report

by Vanessa Virbitsky - Tuesday, April 15, 2008

<http://www.uwosh.edu/today/727/student-managers-to-present-student-managed-endowment-fund-annual-report/>

Student managers of the University of Wisconsin Oshkosh Student Managed Endowment Fund (SMEF) will present their eighth-annual report at the College of Business Advisory Board meeting at 6 p.m. April 16 in Room 202 of Reeve Memorial Union, 748 Algoma Blvd.

Local investment professionals, University faculty, College of Business Alumni Association members, fund donors and the UW Oshkosh Foundation Board are invited to attend and encouraged to challenge presenters during the question and answer portion of the student-led presentation.

A social with the College of Business Advisory Board Members and guests will follow the students' presentation at 6:30 p.m. in Reeve 213.

Real-world experience, real money

SMEF, the first undergraduate student investment fund in Wisconsin, was started in 2000 with a \$25,000 gift from Thomas and Antoinette Brinkman of Oshkosh.

The intent of SMEF is to strengthen students' academic experience by providing hands-on investment management experience and give students the opportunity to make investment decisions using real money.

"This program is important because the donors' contributions provide educational benefit for numerous students beyond the scholarships that they fund," said Stephen Huffman, UW Oshkosh SMEF faculty director. "For example, the \$25,000 donation that the Brinkmans gave in 1999 has provided scholarships for the last five years, but more importantly it has provided funds that have been managed by 18 classes.

"Further, those funds will continue to be managed by students in futures classes. As the portfolio value increases with new donations, we plan to expand the number of students in the program each term."

Currently, the program is managed by seven College of Business students and directed by UW Oshkosh faculty members Huffman and Kristine Beck.

In just eight years, the SMEF has grown from the Brinkmans' generous contribution to a five fund portfolio with contributions from the Anne Hillenbrand Family Fund, Arnold Peterson Chalberg and Charlene Barr Chalberg, Barbara and Roderick Barr Fund of the Greater Cincinnati Foundation, College of Business Alumni Association and Thrivent Financial.

With the addition of the Hillenbrand fund in December 2007, students have seen the fund increase to

nearly \$223,000.

The Spring 2008 SMEF report can be viewed [here](#).

The faces behind the funds

The student fund managers are responsible for developing, reviewing and revising investment policy statements, actively managing endowment portfolios by evaluating financial assets, implementing appropriate investment strategies and monitoring the fund's portfolios.

This semester's student fund managers and their research sectors include:

- Ryan Chart, Burlington, portfolio specialist, financial and business service
- Dave Dejewski, Hartland, portfolio specialist, hardware and software
- Amanda Haas, Campbellsport, portfolio manager, media and telecommunications
- Amy Jermier, Wisconsin Dells, portfolio senior manager, consumer services
- Steve Rankin, Neenah, portfolio manager, consumer goods and healthcare
- Eric Stetler, Blue River, portfolio manager, energy and utilities
- Sarah Stevenson, Kewaskum, portfolio manager, industrial materials

Pictures and biographies of the SMEF student managers can be viewed [here](#).

For more information about SMEF, contact Kathy Fredrickson at (920) 424-3270 or fredrick@uwosh.edu