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|  | **Calgary Portfolio Management Trust**  **Application Process** |

*“Calgary Portfolio Management Trust provides a training ground for some of Canada’s top finance students. Through this innovative program, created and operated with generous support from the Chartered Financial Analyst Society (CFA) Calgary, students manage a $700,000 portfolio of Canadian and U.S. equities. Students obtain one finance half course credit and gain valuable knowledge and skills in equity research, financial modeling, portfolio tracking, teamwork, public relations, and investment skills.”*

The CPMT Selection Committee will be selecting additional students to join CPMT. The CPMT program is very intensive and requires that the chosen students have strong spreadsheet skills and an interest and knowledge of finance. In addition, since the program entails working in a group environment having excellent interpersonal skills and written and oral communication skills are necessary.

We will be considering students from any discipline, i.e. you do not have to be a finance major to be considered, but you need a two-year runway to facilitate peer-mentoring and succession. That said, non-finance majors must show a passion for investing and capital markets. We will be considering both Undergraduate and MBA students.

Your application must include:

* Completed application form
* Resume (one-page)
* Statement of intent - (maximum 1 page typed, 12-pt font) outlining why you would like to join the CPMT and what skills and talents you can contribute
* An unofficial transcript of grades (we will be screening primarily on prior grades in ACCT, MATH, STAT, CPSC, ECON and FNCE courses)

To obtain your unofficial transcript follow the instructions on this link: <http://ucalgary.ca/registrar/unofficial-transcript> - include the pdf in your application package.

Your application package should be submitted electronically to [thomas.holloway@ucalgary.ca](mailto:thomas.holloway@ucalgary.ca) from your University of Calgary E-Mail account. The subject line in your E-Mail communication should be “CPMT Application” and your name.

You will be contacted within a few days following the deadline as to whether you will be invited for a first-round phone interview. Following a successful first-round interview, applicants will be invited to final-round interviews with current CPMT Board members and Portfolio Managers. Applicants will prepare a one-page stock pitch to be presented to the selection committee during the final-round.

Unfortunately, due to the small number of students we can select, it is possible that some highly skilled and capable applicants may not be offered a position in the CPMT program this time around. If this applies to you, please consider reapplying in the next round, or consider applying for the opportunity to participate in other specialized finance opportunities, such as being invited to be a member of the Global Investment Research Challenge team, MIPC Case team, CFA Ethics team, Van Berkom Small Cap Case team, among others.

We have attached our approximate process timeline below:



For reference, the relevant dates from our recruiting cycle last year are shown below:



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|  | **Calgary Portfolio Management Trust – Application** | |
|  | | Date |
|  | |  |
| **Contact Information** | | |
| Name | | U of C ID# |
|  | |  |
| Email Address | | |
|  | | |
| Phone Number | | |
|  | | |
| **Required Information** | | |
| Have you attached your resume and transcript? | | |
| Have you attached your personal statement? | | |
| **Availability** | | |
| Please describe any other commitments that may affect your ability to participate in the CPMT. | | |
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By signing this application, you declare that you realize that part of the selection criteria for CPMT members will involve a review of your academic grades that will be provided by the Associate Dean, Undergraduate Programs, to Haskayne School of Business Faculty Members. The academic review will consider all courses but will pay particular attention to your grades in finance, accounting, economics and statistics courses.

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| Applicant Signature |
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Your application must include:

* Completed application form
* Resume (one-page)
* Unofficial transcript
* Statement of Intent - (maximum 1 page typed) outlining why you would like to join the

CPMT and what skills and talents you can contribute as a member of CPMT.

**PLEASE SUBMIT TWO PDF DOCUMENTS   
(1) APPLICATION PACKAGE (RESUME, STATEMENT OF INTENT, AND APPLICATION FORM)   
(2) UNOFFICIAL TRANSCRIPT**

*\*If needed, link to free pdf combine below\**[*https://smallpdf.com/merge-pdf*](https://smallpdf.com/merge-pdf)