Attention: Finance Students
Apply to attend an exclusive Financial Advisor Conference

Application due October 3, 2014, by noon

Are you looking to break into the independent financial advisor industry? There’s no better place to connect with the nation’s top financial advisors than Charles Schwab’s IMPACT 2014 conference! This exclusive, invitation-only forum brings financial advisors together with influential presenters, exhibitors, and subject-matter experts for opportunities to learn about and collaborate on key industry issues and best practices.

Student Program
What’s more, the conference includes a Student Program that connects financial advisors with select students from top universities – such as The University of Akron – where leading programs in Personal Financial Planning and Wealth Management are offered.

This year, Schwab is hosting a student-specific presentation, “An Empowered Future: Meet the Students.” This is open to all attendees and is designed to connect financial advisors with students. Following the presentation, all students and interested advisors can continue their discussion during an informal lunch in a private dining room.

Students benefit from full access to all education sessions and keynote speaker presentations including George W. Bush, 43rd President of the United States and Dr. Ben S. Bernanke, past chairman of the Board of Governors of the Federal Reserve System. In addition, students are invited to regional dinners to dine, mingle, and network with Charles Schwab advisors and sales team members in a relaxed and friendly atmosphere.

More info at: http://impact.schwab.com/

Application attached
For the third consecutive year, thanks to the generosity of James ’82 and Diana McCool ’80, five University of Akron finance students will attend the Charles Schwab-sponsored IMPACT conference. Scheduled for November 4-7 in Denver, the conference allows students to gain valuable exposure to the Registered Investment Advisor community, as well as exhibitors and advisors from around the country.

James McCool is executive vice president of client solutions for Charles Schwab in San Francisco, and both he and Diana are proud University of Akron graduates. Over the years, Jim has shared his expertise with UA business students in a number of forums: as keynote speaker of the 2012 Economic Summit, an H. Peter Burg Personal Leadership and Development lecturer, and a Dr. Frank Simonetti Distinguished Alumni Award recipient. Diana also has contributed to student success, interacting with various UA finance student groups and sharing her positive message about Midwestern values. Most importantly, the couple believes in giving back and has made personal gifts enabling UA business students to take advantage of this incredible opportunity!

Along with the gift from the McCools, UA’s Department of Finance, with assistance from the Department of Finance Advisory Board, will provide financial support for the trip. Students selected to attend are required to pay only $100. The department will book air travel and hotel rooms, and reasonable food expenses (breakfast, lunch and dinner when not provided by the conference) will be reimbursed with receipts. Students are responsible for ALL other expenses.

ALSO, STUDENTS ATTENDING THE 2014 IMPACT WILL BE ASKED TO SHARE THEIR EXPERIENCE WITH THE FINANCE ADVISORY BOARD, THE FPA STUDENT CHAPTER, OR THE FMA STUDENT CHAPTER.

To be eligible for IMPACT 2014, students MUST have completed 60 credit hours (including 6400:343), have a minimum 3.0 GPA, and submit by noon on October 3, 2014, all of the following to Professor Suzanne Gradisher, CBA 227:

1. Completed application form;
2. Essay of no more than two pages (typed 12-point font, one-inch margins) discussing how the student will benefit from the experience and why the student should be selected over other applicants; and
3. An official transcript (student copy accepted).

QUESTIONS?
Call Professor Gradisher, 330-972-6330, or contact Susan Smith at 330-972-5691, smg16@uakron.edu.
2014 IMPACT CONFERENCE AND EXPO
UNIVERSITY OF AKRON STUDENT PARTICIPATION APPLICATION FORM
APPLICATION DEADLINE: NOON ON OCTOBER 3, 2014

I. General Information
   a. Name (as it appears on driver’s license): __________________________________
   b. Current Address: _____________________________________________________
      ___________________________________________________________________
   c. Phone: _______________________; Alternate Phone: _______________________
   d. Date of Birth: _______________________
   e. Emergency Contact (name and phone): ____________________________________
   f. E-mail: _____________________________; Student ID: _______________________
   g. Dress Shirt Size (needed if selected)  ___XS  ___S  ___M  ___L  ___XL
      Circle one:       Men’s    Women’s

II. Program information
   a. Major: ______________________   Total Hours Completed: _______________
   b. Financial planning curriculum courses completed:
      __________________________________________________________________
      __________________________________________________________________
      __________________________________________________________________
   c. Grade Point Average (GPA): ____________
   d. Active FMA member: ________       Active FPA member: ________
      (Active FMA and FPA members will be given preference)

III. Essay: I am attaching a completed essay as described in the cover sheet.

IV. Attached is an official transcript (student copy accepted).

V. If selected, I understand that I will be required to submit a $100 fee.

VI. If selected, I will abide by all University rules and the requirements of the
    conference holder as may from time-to-time be communicated to me.

VII. SUBMIT NO LATER THAN NOON ON OCTOBER 3, 2014, TO:
    Professor Suzanne Gradisher, Finance Department 227

Signature: __________________________________________________________________

Print Name: __________________________________________________________________

Date: _____________________________________________________________________