

UC Investments Academy



PROGRAM OVERVIEW

UC Merced is collaborating with the team that invests the University of California's endowment and retirement savings, UC Investments, to host a program to help students explore a possible career in the asset management industry. This program is completely free to students and includes the very same training that recent college graduates starting their careers at investment firms have undergone before embarking on successful careers managing money for others. The program hopes to open doors to UC Merced students who may not have known about, felt welcome in or considered such careers before. Everyone is welcome and encouraged to apply. We invite you to come see for yourselves and take advantage of this unique opportunity for you and for UC Merced.

WHAT IS A CAREER IN INVESTING/ASSET MANAGEMENT?

Here are some things you may not know about careers in investing:

- Your clients tend to be institutions that invest the savings for teachers, firefighters, and healthcare unions and companies, that are responsible for ensuring that their employees' retirement savings grow enough to enable them a secure retirement.
- Or your clients may be universities and charitable foundations that are responsible for investing their endowments (gifts from generous donors) so that they can fund scholarships and grants to support charities.
- Investors provide capital to entrepreneurs in sectors ranging from clean energy to bio-technology to software and in countries around the world.

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IS THIS PROGRAM FOR YOU?

We have two customized UC Investments Academy “tracks” you can choose from. Please see outlines below:

1) Career Track: Geared towards technical training and education in addition to progressing through the entire program. If you are interested in a career in finance and investing this program is for you.

2) Personal Finance Track: Geared more towards personal finance, awareness, access, networking and general career strategy. If you are interested in learning about investing and the industry, but are not committed to a career in finance this is for you.

The program is for all UC students that are:

- Interested in learning about investing and developing their careers
- Can commit to actively participating in the program with flexibility to work at your own pace for certain parts of the program
 - **Career Track:** Approx. 5 hrs – 10 hrs / week for 1 – 2 months in the Fall and Spring
 - **Personal Finance Track:** 1 hr / week on average in the Fall and Spring
- Have demonstrated academic achievement

PROGRAM DETAILS

The program will consist of online classes and a series of guest speakers from diverse backgrounds currently working in the field. Included will be many insider views into the dynamic and lucrative investment arena.

- **Investment analysis curriculum (provided by [Training The Street](#)):**
 - Online self-study materials throughout the quarter (20 – 30 hours)
 - Instructor-led Zoom training sessions in Oct-Nov on two Saturdays from 9am – 12pm (6 hours)
- **Live guest speaker sessions via Zoom:**
 - 2 – 3+ Typically weekday evening Zoom sessions per semester (+3 hours)
 - Optional access to ~20 previously recorded Zoom session library (+20 hours)
- **Virtual work experience (provided by [The Forage](#)):**
 - 2+ virtual work assignments with investment firms in per semester (10 – 25 hours)
- **Access to investment community and network:**
 - Interact with investors and other like-minded students within the UC system, including firms interested in recruiting Academy students for career opportunities
- **Financial literacy programming:**
 - Learn how to create wealth for your future with on financial literacy programming (1 – 10 hours)
- **Career strategy sessions:**
 - Gain access to UC investments team members and network of professionals to advise investment strategy to help you achieve your goals

If you have any questions or concerns, please contact UC Investments (UCInvestmentsacademy@ucop.edu).

APPLY HERE