

SWOAFP April Meeting Notice

Meeting

Topic: The Davis Center Tour and Discussion (at the University of Dayton)
Presentation by: **Members of the Management Team of the Davis Center**
They will be speaking on the R.I.S.E. Symposium (see below) and The Flyer Investments Program of the center.

Dinner at The Chop House to follow the tour. Please RSVP whether or not you will be attending the tour *and* the dinner or just the tour. (Directions to the restaurant will be provided at the tour.)

Date: April 19, 2006
Time: 5:00 - 6:00

Location: University of Dayton

The Center for Portfolio Management was formally founded in the fall of 1999 by Dr. David Sauer, Dean Sam Gould, Inaugural Manager Adam Molina, and the University of Dayton Administration.

Beginning in the fall of 1999, the Center for Portfolio Management was formally open to the University community. The Center staff, all undergraduate students, was arranged into teams to allow for focused programs and individual responsibility. The teams included: Professional Relations, Undergraduate Outreach, Community Outreach, Development, Operations & Logistics, and Management. Each team created programs designed to further the goals of The Center in reaching to students throughout the University as well as members of the community.

In 2000, The Center was formally recognized as an attraction exclusive to the University.

In April 2001, the Center introduced the R.I.S.E. (Redefining Investment Strategy Education) Symposium. R.I.S.E. is a first-of-its kind symposium bringing together students, professionals, and academics in a learning and sharing environment where investment education is linked with investment strategy. In 2005, More than 1,000 people, including students and faculty from 133 colleges and universities representing six countries, attended RISE 2005. In addition, portions of RISE were broadcasted to more than 800,000 people in 130 countries.

In 2002, the Center software programs were upgraded to include three new software programs; Research Insight, BondEdge, and ValueLine. Other accomplishments for the year included many high-profile public relation wins including an appearance on CNNfn, a radio presence on PBS, and multiple articles published in the Associated Press.

2003 saw the renaming of The Center for Portfolio Management to The Richard P. and Susan P. Davis Center for Portfolio Management (The "Davis Center") after a generous gift by the Davis family, who are long-time Center and University supporters. In addition, staff members oversaw the initial creation of The Davis Center Alumni Association, the increased coverage of the internship program, and benefited from the addition of a databoard to compliment the stock ticker already present in The Davis Center.

Another component of The Davis Center is Flyer Investments, a capstone investment course in which 15 students invest a portion of the university's endowment. The top tier students of the business school apply and interview to be selected each semester. In 2005 they invested \$3.6 million and have successfully outperformed their benchmark, the S&P 500 by 2.5% annualized over the past 5 years. Putting \$3.6 million in the hands of college seniors is the ultimate hands-on experimental learning.

Directions to the University of Dayton:

From I-75, northbound (from Cincinnati)

Exit #51 at Edwin C. Moses Boulevard. Turn right and follow Edwin C. Moses Boulevard east to Stewart Street. Turn right and continue on Stewart Street to the University of Dayton entrance arch (on the right just after you cross Brown Street). Turn into this entrance and follow the signs to the Visitor Center

Tell the Visitor Center staff that you are a Davis Center Guest. The staff in the Center will provide the parking pass and direct you to the parking lots and to Miriam Hall.

Upcoming Activities

- May 17th - Annual meeting, scholarship presentation, and speaker on the B&B Riverboat. Hear Bob Bernens from Core Risk Services discuss Disaster Recovery Plans and how some companies implemented their plans during the hurricanes in the gulf.

Membership Info

- We appreciate your patience while we switch credit card vendors. The new payment link should be out on the website soon. In the meantime, if you would like to process your membership via credit card, please contact any of the Board members (members noted on the site). The 2006 invoice is available at www.swoafp.org.

Other

- We Want You.....to be involved in the SWOAFP Board and making this organization stronger. Interested? Please contact Lynn Grismer at lynn.grismer@csmg-online.com or any of the other board members.