UC Irvine launches inaugural personal finance summer program for high schoolers

Program is offered through the Center for Investment and Wealth Management at The Paul Merage School of Business

Irvine, CA – March 31, 2016 – This summer, thirty highly motivated high school students have the opportunity to enroll in the inaugural UC Irvine summer excellence program, Investments, Financial Planning and You, a new, week-long personal wealth management, investing and financial planning program offered by the Center for Investment and Wealth Management (CIWM) at The Paul Merage School of Business.

Scheduled for July 25–29 on the UCI campus, Investments, Financial Planning and You is an intense program intended for academically motivated high school students who wish to gain a deeper understanding of macroeconomics and global financial markets. Andrew J. Policano, PhD, faculty director for the CIWM and renowned economist; Chris Schwartz, PhD, associate professor of finance at the Merage School; and, Feroz Ansari, MBA, MIM, CFP®, senior principal and portfolio manager for Compak Asset Management, will lead the program.

Students will experience a unique learning environment filled with inspiring presentations, case studies and group projects. They will learn to analyze and evaluate stocks, bonds, mutual funds and ETFs, develop and back test optimal investment portfolios, and familiarize themselves with personal wealth creation and retention. At the close of the program, each student will have
created a personal wealth management plan, paving the way for lifelong preparation towards building financial success.

“We are delighted to be able to offer a rigorous academic program for high school students and advance the study of financial literacy into our communities,” stated Policano.

“This is a phenomenal opportunity available to young adults,” said Ansari, adding, “An opportunity that has been custom designed to explore investments and financial planning, setting the building blocks for our children to shape their futures with actionable personal wealth plans.”

Applications are being accepted now on a rolling admissions basis; space is limited. Deadline to apply is April 30, 2016. Contact Lee Anne Maki, associate director for the CIWM, at lmaki@uci.edu or (949) 824-2675 for more information.

About the Center for Investment and Wealth Management
The CIWM is one of seven Centers of Excellence at the UC Irvine Paul Merage School of Business. Its mission is to create and disseminate vital, applicable research and knowledge concerning the creation, management and inter-generational transfer of wealth. The Center is gaining national recognition as a source of cutting-edge research and innovative programs that advance our understanding of and successful practice in the field of wealth management, including all of its relevant disciplines and audiences. CIWM is dedicated to the study of global financial markets to gain a better understanding of effective investment management techniques, the overall global financial system and the role and effectiveness of financial markets in fostering socially responsible, sustainable economic growth, the study of wealth management techniques to discover the most effective methods for creating, preserving and growing wealth, assessing philanthropic opportunities, implementing a tax efficient transfer of wealth and building and preserving family legacy and harmony, and the development and delivery of programs and informational reports based on the above research and other information. For more information, visit: merage.uci.edu/ResearchAndCenters/ciwm/, or follow us on Twitter @CIWMFinLit.

About The Paul Merage School of Business at UC Irvine
The Paul Merage School of Business at UC Irvine offers four dynamic MBA programs – plus PhD, specialty masters and undergraduate business degrees – that graduate world-ready business
leaders with the exceptional ability to help grow their organizations through strategic innovation, analytical decision-making, information technology and collaborative execution. While the Merage School is relatively young, it has quickly grown to consistently rank among the top 5 percent of all business programs worldwide through exceptional student recruitment, world-class faculty, a strong alumni network and close relationships with both individual business executives and global corporations. Additional information is available at merage.uci.edu.

###