

PRIME Application – October 2026

Managers and analysts in the PRIME program are given the opportunity to manage a portfolio of stocks valued at approximately \$3,600,000. PRIME requires a two-year commitment by students, typically during their third and fourth years of university. During their first year in the program, PRIME students serve as analysts, usually assigned to cover a particular sector of the TSX, and then become portfolio managers in their second year. Analysts must enroll in Finance 312 (Investment Principles) in their 1st year of the program and complete Finance 416 as part of their degree program in order to meet the co-requisites of PRIME.

During their second year of the program, portfolio managers enroll in Finance 436 (Investment Management) in which they obtain course credit for the experience of managing the PRIME Fund. Both analysts and managers participate in a mentoring program, where they are assigned to a practicing Chartered Financial Analyst (CFA) Charter-holder and attend seminars on topics such as industry, sector and firm analysis, and overall portfolio management.

This application has two parts.

Part 1: Information that will be seen by PRIME student managers

This part asks for candidate information. *PRIME student managers will review this information in order to prepare for candidate interviews.* Do not reveal your student ID number on this part, as this is confidential information.

Part 1 is to be completed and emailed to prime@ualberta.ca.

Part 2: Information that will be seen only by faculty

This part asks for grade information on selected courses and includes the **PRIME Applicant's Attestation, Agreement, and Code of Conduct**, which must be completed by all candidates. *Only faculty members (specifically, the Program Director) will review this information. It will not be divulged to the PRIME student managers.*

Part 2 is to be completed and emailed to skwalton@ualberta.ca.

APPLICATION CHECKLIST

- ☐ Complete all written parts of the application form (both Part 1 and Part 2).
- ☐ Email the completed application form (Part 1) – **excluding this cover page** – and your resume and letter of intent to prime@ualberta.ca **before 11:59 PM on Sunday, October 25, 2026**. *PRIME student managers will review the information in this submission. Do not include transcripts in the Part 1 submission.*
- ☐ Email the completed application form (Part 2) and attached grade transcripts to skwalton@ualberta.ca **before 11:59 PM on Sunday, October 25, 2026**. *This will not be seen by PRIME student managers.*

Before 5 PM on Tuesday, October 27, 2026, you will receive an e-mail notice of whether or not you are invited to schedule an interview.

PART 1: GENERAL INFORMATION AND LETTER OF INTENT

THE PRIME PROGRAM’S STUDENT MANAGERS WILL REVIEW THIS PART OF THE APPLICATION. PLEASE DO NOT PUT YOUR STUDENT IDENTIFICATION NUMBER ON THIS SECTION

(To be emailed to prime@ualberta.ca)

1. PERSONAL INFORMATION:

Name: _____

Phone Number: _____

E-mail: _____

(UAlberta-provided email address only)

Major of Study _____

Will you complete FIN 201 by the end of this school year? Yes No

Are you in the process of completing FIN 201? Yes No

Are you a co-op student? Yes No

Are you an after-degree student? Yes No

2. PRIOR WORK EXPERIENCE:

Please list recent work experience. Please limit your responses to no more than two jobs.

Employer	From	To	Hrs per week

3. Please email your application (Part 1), letter of intent, and résumé to prime@ualberta.ca. *Do not include grade transcripts in the email. Recall that PRIME student managers will be reviewing this information; only include that information you feel comfortable revealing to a group of your fellow students.*

4. **LETTER OF INTENT:**

In less than a page, please indicate what you hope to get out of PRIME and what you can bring to PRIME if chosen. *This separate letter of intent must be emailed along with the application and resume.*

5. **EXTRACURRICULAR ACTIVITIES:**

List your current affiliations with student organizations and clubs, as well as any other activities relevant to your PRIME application.

6. **Other Important Information:**

Is there any reason why you might expect to be unable to physically attend regular weekly meetings of the PRIME Fund during either the 2027-28 or 2028-29 academic years for two or more consecutive meetings? Meetings are usually held weekly during the Fall and Winter academic terms on Monday evenings from 5:00 – 6:30 pm.

Students selected for PRIME must take FIN 436 and this course must be used as part of your regular complement of Finance courses in your degree program. That is, you should not expect to take FIN 436 over and above a regular course load. Students selected for PRIME will be required to meet with an academic advisor to ensure that credits for FIN 436 will be part of the 120 maximum credits students are allowed and that the credits are consistent with their program of study.

Once you have completed Part 1 of the application, complete Part 2. Part 2 and any supporting transcripts will be seen only by faculty members (e.g. the Program Director).

Part 2: Grade Summary Information

ONLY FACULTY MEMBERS (E.G. PROGRAM DIRECTOR) WILL SEE THIS PART OF THE APPLICATION

(To be emailed to skwalton@ualberta.ca)

Name: _____

Student ID #: _____

Course	Course taken, if an equivalent of named course (Only include FIN 201 if you have completed the course)	Grade achieved (4-point scale)
FIN 201		
ACCTG 211		
BUAN 212		
ECON 101		
ECON 102		
MATH 113/114/154		
AVERAGE: Please compute the average of the grades shown above Please list CR/NCR for the grade submission in Part 2 of your application if applicable. Please use letter grades where possible. Use only your available letter grades to calculate your average (omit any CR/NCR grades from the calculation).		

For the purposes of computing a grade point average, use the following table to convert your letter grades to numerical values. This table is taken from the University of Alberta calendar.

Letter Grade	Grade Point Value
A+	4.0
A	4.0
A-	3.7
B+	3.3
B	3.0
B-	2.7
C+	2.3
C	2.0
C-	1.7
D+	1.3
D	1.0
F or F4	0.0

Please attach supporting grade transcripts. Unofficial transcripts are acceptable at this point in the process. The PRIME Program Director reserves the right to ask for official transcripts at a later date.

PRIME Applicant's Attestation, Agreement, and Code of Conduct

In order to have my application to the Program for Research and Investment Management Excellence (PRIME) at the Alberta School of Business considered, I understand and agree to the following items:

1. I attest that all information provided on the PRIME application is, to the best of my knowledge, truthful, and complete.
2. I understand and agree that PRIME student managers may review any information I include under Part 1 of this application, including my résumé.
3. I affirm that if my application to PRIME is successful, I will use FIN 436 as part of my complement of finance courses specific to my program of study, and that the 3 credits I may earn from that course will be part of the maximum 120 credits allowed BCom students.
4. I agree that the application and recruitment process for PRIME is extracurricular work, over and above my course work. I agree that my coursework is my first priority and that my instructors are not expected to make any allowance due to any element of the PRIME recruitment process.
5. I agree that a list of the names of candidates in the PRIME recruitment process, including my own, may be provided to instructors at the Alberta School of Business.
6. I agree that I will not seek any assistance on any element of the PRIME recruitment process from third parties beyond that which may be provided to all PRIME candidates as approved by the PRIME Program. Any work I submit will be entirely my own, performed in a manner conforming to the University of Alberta's Code of Student Behaviour, which may be viewed at www.governance.ualberta.ca.
7. I agree that violations of any part of this agreement will result in my disqualification as a PRIME candidate or in my termination from PRIME, should such violations be revealed after I have been admitted to PRIME.

Date: _____

Name (print): _____

Student ID #: _____

E-mail: _____ (Must be uAlberta address)

Signature: _____