

James and Dolores Trethewey APMP Professor Annual Summary -2023

Dean L. Johnson, Ph.D.
James and Dolores Trethewey APMP Professor

Dean, College of Business
Founding Director, Applied Portfolio Management Program



Applied Portfolio Management Program students visit Wall Street in March 2023

Overview:

Dee Trethewey's support of the Applied Portfolio Management Program (APMP) is remarkable. Dee has developed a passion for APMP and Michigan Tech that has only increased over time. As a result, APMP continues to flourish and impact students with a unique educational experience that will set them on the path for a successful career. There are literally hundreds of APMP alumni leading successful careers and providing for their families due to Dee's generous support. On behalf of all of them, I thank you for your substantial support.

Student Scholarships:

APMP seeks to recruit and support high-quality students with a keen interest in experiential education. We seek students who are motivated to learn, develop their professional skills, and differentiate themselves. In 2022-2023, APMP was pushed to its capacity limits with three teams and 22 students participating in the program. Scholarships were provided to students in the spring semester. These students have secured solid positions with leading financial advising and accounting firms. APMP is a key recruitment tool for incoming freshman supporting the vision of the College of Business for enrollment growth. Your gift is supporting not only APMP, but the College of Business and the entire university.

Student Support:

Each year, a handful of APMP seniors elect to pursue graduate degrees at Michigan Tech. In a clear sign of the impact of APMP on their academic careers, these APMP alums are always eager to support the program by agreeing to serve as mentors and teaching assistants for the current teams. During the upcoming year, three APMP graduates will be supported as mentors.

FinTech:

Starting in 2023, Dee's generous support will allow APMP to support the acquisition of a Bloomberg machine. Bloomberg is a leading investment technology tool but comes with a very high annual subscription fee. The College of Business and the MTU Library will share the cost. I strive to keep our strategic position in mind. Indeed, we are a College of Business embedded in a technology university. Technology continues to alter and transform careers in finance. Today's finance students need to understand and be adept in technology tools. Bloomberg will also support the College of Business FinTech minor. Computer updates in the APMP Trading Lab is a continual activity.

Travel:

2023 saw a return of the in-person Investment Conference and Competition in New York City. Eleven APMP members made the trip. They were able to attend the conference to hear world-class investment professionals, compete in the investment competition and tour investment firms in NYC. APMP was declared the national investment champions during the virtual 2022 competition with the highest risk-adjusted returns on their portfolio. While we didn't repeat as champions at this year's conference, it was a rewarding and life-altering experience for the APMP students to attend the conference in-person.

Thank you, Dee! As always, your support is a standing testament to Jim and his love for the Applied Portfolio Management Program, the College of Business and Michigan Tech. You are a very special person to me.

Sincerely,

Dean L. Johnson
James and Dolores Trethewey APMP Professor
Dean, College of Business
Michigan Technological University
[906-487-2668](tel:906-487-2668)
dean@mtu.edu



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