Dr. David Krause has been director of the Applied Investment Management program since 2004. Before joining Marquette, Krause was active in several businesses he co-founded that were engaged in manufacturing, health care and financial services. He was previously a member of Marquette’s finance faculty in the 1980s.

Krause received his BBA, MBA and Ph.D. degrees in the field of finance and has concentrated his studies in investments, economics and statistics. He is a lifelong student of the financial markets and serves on numerous boards and investment committees of nonprofit organizations.

For more information about ways to support the Applied Investment Management program, please contact Dr. David Krause at 414.288.1457 or david.krause@marquette.edu.
Applied Investment Management

Marquette University's College of Business Administration is home to one of the nation's top undergraduate programs in applied investment management. The AIM program allows a select group of finance majors to get hands-on academic and security analysis experience, including summer internships and the opportunity to actively manage equity and fixed-income portfolios throughout their senior year. Students study the core body of knowledge covered in the Chartered Financial Analyst Level I exam — preparing them to take the test upon graduation and begin a career in the money management industry.

AIM’s rigorous curriculum includes courses on research and financial analysis, valuation and portfolio management, and investment management and ethics. Along with a state-of-the-art investment research room, opportunities to visit premier financial firms and an advanced network of alumni finance professionals, AIM students are uniquely prepared to begin work as investment management professionals upon graduation.

In 2006, Marquette’s AIM program became the first undergraduate business program selected as a CFA Institute Program Partner. Every year since the program’s inception, AIM students have achieved a 100 percent career placement rate and surpassed the global pass rate on the CFA Level I exam.

In addition to the traditional finance curriculum, there are four unique AIM courses.

**Introduction to Applied Investment Management** covers the basics of the securities markets and is intended to prepare students for summer internships.

**Research and Financial Analysis** provides a thorough grounding in quantitative research methods, economic relationships and financial statement analysis. Students in this course manage equity and fixed income portfolios.

**Valuation and Portfolio Management** includes the common approaches to valuing assets, the basic measurements of risk and return, and the key elements of the portfolio management process. Students manage the portfolios, evaluate performance, prepare reports and present their results at the end of the semester.

**Investment Management, Ethics and Society** emphasizes how to manage investments in an ethically and socially responsible manner. Students acquire a thorough understanding of the CFA professional standards of conduct and how to apply ethical reasoning to realistic money management scenarios.

**RIGOROUS CURRICULUM**

"The distinctive nature of AIM enables students to conduct research across the financial spectrum and apply their knowledge to real-world scenarios. Students are uniquely positioned to sit for the CFA exam and bring value to their organizations from day one."

RAY AUTH, CFA (AIM '06)
ASSOCIATE — INVESTMENT STRATEGY GROUP
MASON STREET ADVISORS — A NORTHWESTERN MUTUAL COMPANY

**LEARNING LABORATORY**

**Tickers and terminals**

The AIM program features a fully equipped investment research room located in the College of Business Administration. Students conduct research in the room, which offers many of the same financial tools (i.e., Bloomberg, Thomson Financial and Morningstar) that investment professionals use on a daily basis.

The benefits of the AIM research room include quick and easy access to financial data, increased exposure to real-time financial market activity, and hands-on experience with the tools of the investment trade.

**BEYOND THE CLASSROOM**

**Real-world experiences, professional relationships**

The AIM program provides students with opportunities to visit financial institutions, gain practical experience through summer internships, participate in various seminars and learn from industry professionals drawn from the investment community. Program members complete a value-added internship during the summer between their junior and senior years. The internships provide students with a chance to rigorously apply their developing financial skills in real-world situations.

Speakers from the investment community and adjunct faculty with authentic experience enhance and augment the financial concepts taught by the finance faculty.