

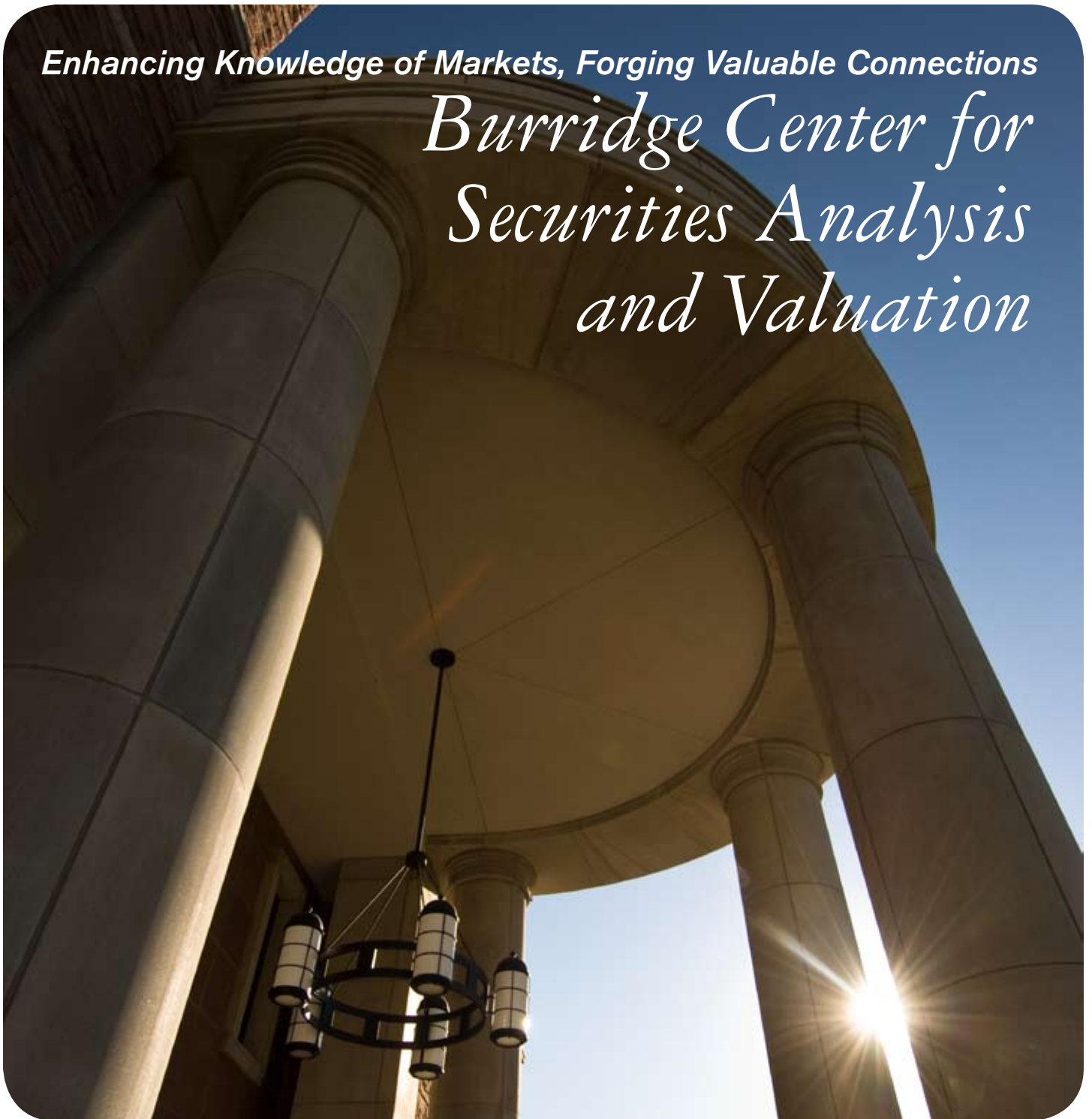
Creating Futures

University of Colorado *at Boulder*



Enhancing Knowledge of Markets, Forging Valuable Connections

*Burridge Center for
Securities Analysis
and Valuation*





“Growing this Center will be transformative for the Leeds School of Business and should help the School increase its national standing and reputation.”

Richard M Burrige Sr. '51
RMB Capital Management

Market Analysis and Valuation

A Topic of Increasing Importance

We live in an age where equity-markets changes are discussed almost as widely as changes in weather. This increased financial literacy and awareness is not surprising as retirement strategies like 401(k)s, which place investment-management responsibilities directly on employees, become increasingly prevalent. Many of us correctly perceive that, whether we pick our own stocks or delegate the task to others, our financial futures are inextricably linked to the health of financial markets. As the need for professional advice and services has increased, the professional money-management sector has grown. The Chartered Financial Analyst Institute now boasts over 100,000 members.

Meanwhile, increasing average lifespans introduce the prospect of longer retirements. Without an offsetting increase in career lengths, more individuals require expanded resources for retirement, deriving future income primarily from investment returns. Recent economic volatility has threatened our confidence in the stock market as a stable platform for our financial futures. We are confronted by headlines spotlighting human tragedies directly related to market turbulence: an 85-year-old Portland woman evicted; central Florida communities wiped out wholesale; state governments laying off teachers and cutting basic education programs.

Educating and preparing responsible money managers is more critical today than ever before. The Leeds School of Business at the University of Colorado at Boulder plays a vital role in money-management education, analysis, research, and professional dialogue. With your support, we can go further still.

The Burrige Center

A Beachhead for Research and Interaction

Launched in 1997 by a landmark gift from CU-Boulder alumnus and CU Foundation trustee Richard Burrige Sr., a successful money manager, the Richard M. Burrige Center for Securities Analysis and Valuation has fostered research and dialogue on issues affecting money managers, their clients, and securities markets.

Each year, the Burrige Center combines the resources of leading academics, practitioners, and regulators for a conference at which pressing issues for security investors and money managers are debated. For example, a recent Burrige conference brought together participants from the Federal Reserve, the Securities and Exchange Commission, a Big Four accounting firm, several prominent universities, and numerous money management firms to consider regulatory challenges in the wake of the recent financial crisis.

In addition to conferences, the Burrige Center supports securities-related research by funding research, presentations, working papers, and publications that inform and influence professional practice and regulation in securities markets. An important aspect of these activities is research interaction with the money-management community and business media. The Center also provides critical financial and logistic support for the training of investment-management students.



With the Center's success to date, we now have the opportunity to do much more. As one of four cornerstone centers of the Leeds School of Business, the Center is embarking on an ambitious plan to increase the reach of its mission, and that of the Leeds school overall. Targeted private investments in Burridge Center people, places, and programs will accelerate our progress, improve the practice and accountability of investment management, and help launch the next generation of responsible money managers educated at the Leeds School.

You Can Support Burridge Center Initiatives

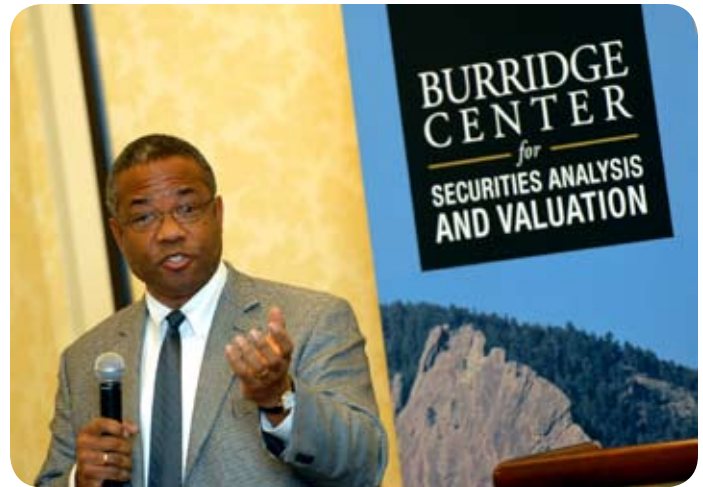
Private donors can help fuel several priorities the Center aims to pursue in the near future, including:

Chaired Professor of Finance: We aim to hire a scholar of national prominence in the field of securities analysis and valuation who will connect the professional, educational, and philanthropic communities, and attract and mentor tomorrow's investment managers. A Chaired Professor would measurably increase the Finance program's visibility and research output, and help CU-Boulder meet a primary strategic goal of bolstering its faculty. *Goal: \$4 million, endowed.*

Research Support: Leeds faculty members are leading thinkers in numerous realms of financial research relevant to money managers. By providing financial incentives to conduct and broadly disseminate research on topics of core interest to the Burridge Center mission and vision, we can make a substantial contribution to the marketplace of ideas on securities analysis, influencing future policy and practice. *Goal: \$2.5 million, endowed.*

Chartered Financial Analyst Program: This program would help us generate more successful finance graduates, ground students in the industry's ethical and professional standards, and enable more individuals seeking this designation to study at CU-Boulder under the guidance of Leeds's outstanding faculty. *Goal: \$1.625 million, endowed.*

Financial Markets Laboratory: A customized trading environment would incorporate specialized database services and high-speed networking to simulate a realistic, real-time trading environment for student learning. *Goal: \$750,000, current.*



Quantitative Finance Certificate: Our nascent quantitative finance program helps to credential students in this fast-growing, high-demand finance specialty. The certificate program is also arguably the best quantitative graduate school preparation program Leeds offers. *Goal: \$500,000, endowed.*

Student Support: We aim to equip students to pursue research on topics of central interest to the Center, and increase undergraduate engagement with the Center and with professional investment management. *Goal: \$625,000, endowed.*

Burridge Conference: Additional support for this long-standing conference would help it continue to attract prestigious speakers and relevant research, and expand the Center's profile. *Goal: \$625,000, endowed.*

Finance Research Prize

Seminar Series: A regular lineup of speakers can help infuse expertise from leading researchers into the CU-Boulder community, exposing our students and faculty to new research and insights. *Goal: \$250,000, endowed.*





You Can Support
Burridge Center Initiatives *(continued)*

Annual Conference Award: This award would be awarded annually to the best paper presented at the Burridge Conference, broadening the Center's visibility and prestige. *Goal: \$1,250,000, endowed.*

Faculty Outreach: We aim to connect with the regional and national business communities, presenting Leeds faculty insights on securities topics. *Goal: \$250,000, endowed.*

To learn about the many ways you can make a gift:

Contact
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All gifts should be payable to the University of Colorado Foundation for the purpose designated.

Become Part of Our Vision

The widespread ramifications of the recent financial trauma have demonstrated just how important the subjects of securities analysis and valuation are to our economy and society. Leeds students, faculty, and the broader community need access to leading-edge ideas, knowledge, and expertise to ensure the health of tomorrow's economy and the financial security of tomorrow's communities. Your gift can help the Leeds School of Business continue to advance the Richard M. Burridge Center for Securities Analysis and Valuation.

We have the people and the vision to make this happen. All we need is your support. Join us on this vital endeavor.

"Thanks in part to the Leeds School of Business, CU-Boulder has the potential to become one of America's outstanding educational institutions in our country. I want to be part of that potential."

Richard M. Burridge Sr. '51
