1. Develop the ability to assess the value of publicly traded equity and fixed income securities.

2. Articulate the common causes of mispriced securities, develop techniques to find these securities, and acquire insight as to how to evaluate the success of their process and decisions.

3. Develop the ability to build portfolios that are designed to produce consistent positive returns and/or outperform benchmarks without taking on significant absolute or incremental risk.

4. Develop the ability to communicate and collaborate effectively within an organization.

5. Understand the importance of ethical behavior within the industry and have an understanding of how to work through ethical dilemmas as they arise.