

To: Ms. Dianne Garret
From: [REDACTED], UNCG Institutional Advancement Office Graduate Assistant
Date: November 18, 2009
Subject: Allocation of \$50,000 Gift

Enclosed is the investment portfolio recommendation you requested. The documents provide a thorough analysis of Johnson & Johnson, Walt Disney, Apple, Build a Bear and Starbucks. Recommendations to where UNCG Institutional Advancement Office should invest the incoming \$50,000 can also be found on the following page.

The following is a list of enclosures and there descriptions.

- The team short report, completed by Sanaa Alyemeni, gives our decision for allocation of the \$50,000.
- Appendix A, completed by Jackie Reed, is a list of questions created for the phone interview with a financial expert.
- Appendix B, completed by each graduate assistant, is an individual report on each company discussing the financial health and investment potential.
- Appendix C, completed by Heather Royal, Katie Crosby and Sanaa Alyemeni describes the current economic health and the effects on each company's industry.
- The work plan, completed by Jackie Reed and Sanaa Alyemeni is the outline used for this project.
- Meeting minutes completed by each graduate assistant, outlines our meetings and tasks accomplished during that time.
- The works cited, completed by Shelby Sisco, provides a list of articles that are referenced within our reports.

At the end of this report there is a portfolio of articles that each graduate assistant found and used in the research of their individual company.

I am confident that this document will assist you in the investment of the \$50,000 gift. It will prove helpful to the UNCG Institutional Advancement Office in assessing the financial stability and return on investment. If you have any questions regarding the enclosed document please feel free to contact me at jdreed@uncg.edu.

Enclosure