

5th ANNUAL

FINANCE FEST

PRESENTED BY

SENDERO[®]

Navigating wealth
beyond investments

GUIDELINES

 Stock Market Trading / Investing Simulation

OCTOBER 1, 2026 – MARCH 31, 2027

Each school registers one team for a simulated trading environment. Teams receive a **\$100,000** virtual trading account through Personal Finance Lab and manage it over six months.

Every team needs a faculty or staff sponsor, and the role is light: check in with your team a few times a month. No finance background required. Sendero mentors bring the market expertise and are available whenever your sponsor wants a hand.

Key guidelines include:

- **Platform:** All teams will use the paid version of Personal Finance Lab, with access costs covered by Sendero Wealth Management.
- **Eligibility:** One team per school, with a designated faculty sponsor. Team mentors can be provided upon request if a sponsor needs assistance coaching students.
- **Tradable Assets:** Stocks or ETFs priced above \$10, and mutual funds with no price limit. Bonds and cryptocurrency are not allowed.
- **Portfolio Limits:** No more than 10% of the portfolio may be allocated to a single stock or ETF.
- **Mutual Funds:** Up to 25% of the portfolio may be invested in a mutual fund.
- **Margin Account:** All teams will operate a margin account. Short selling is allowed.
- **Day Trading Policy:** To encourage thoughtful strategy, day trading is not allowed.
- **Monthly Growth Awards:** A \$50 prize will be awarded monthly to the team with the highest portfolio growth percentage.
- **Final Awards:** Cash prizes of \$500 (1st), \$300 (2nd), and \$200 (3rd) will be awarded based on final portfolio return.

PRIZES			
STOCK MARKET TRADING / INVESTING SIMULATION Based on final portfolio return.	\$500	\$300	\$200
	1ST	2ND	3RD
\$50	MONTHLY GROWTH AWARD Presented to the team with the highest monthly portfolio growth during the stock market trading / investing simulation.		

Questions? Email us at financefest@sendero.com or visit sendero.com/finance-fest

Finance Fest is an educational competition. All trading is simulated: no money is invested and no securities are bought or sold. Securities students select or pitch are their own choices, not Sendero research or recommendations, and Sendero and its clients may hold positions in them. Mentors are volunteers providing general financial education, not investment advice, and participation creates no advisory relationship. Margin and short selling are enabled for educational purposes only; in actual accounts they can cause losses exceeding the amount invested. Personal Finance Lab is an unaffiliated provider with its own terms and privacy policy, and scoring relies on its reported results. Sendero Wealth Management is a registered investment adviser; registration does not imply skill. Full rules at sendero.com/finance-fest.