**Section I – Company background-Oct 16 (Monday)**

Objective: At the conclusion of this project students will be able to use a variety of resources to research a corporation and prepare a well-written paper describing the corporation and its business environment.

1. To Do: You will be researching the publicly traded company and preparing a paper summarizing specifics things about this company. You will include detailed description of the company including the primary business activities, a brief historical summary of the company, a list of competitors, the company’s position within the industry, recent developments within the company/industry, future direction, business risks, and other items of significance to your corporation.

Additionally, I would like you to make one connection between the work we did as a group on the financial statements and the qualitative information that you are reading about from the SEC website as described above. A specific example of how you can make a connection will be discussed in class.

1. Include information from each of the following Three resources.
   1. Form 10-K found at [www.sec.gov](http://www.sec.gov) (see attachment 1 on how to find this)
      1. Read through item 1 “Business Summary” to locate information regarding the business, product offerings, marketing strategy, competition and business risk as well as market share.
      2. Read through item 1A. This is a description of the business risks for the company as well as a perspective in the competition in this industry.
   2. From the company website -search using your company name and investor relations (see attachment 1 on how to find this)
      1. Review the annual report on the company website in the investor relations section. Review the letter to shareholders which summarizes the past year and highlights future plans.
      2. Other information from the corporate website may include links to current events for the company that you may find noteworthy.
   3. Other resources
      1. Review at least one article from recent business periodicals. Example sources include The Wall Street Journal, Forbes, Fortune, Inc., and Business Week. These are available electronically through our library database. You are looking for current events impacting this company. Avoid using a blog or an advertisement. Consider your source!
2. Submit a written summary report that is two to three pages long that addresses the points described above in point part A. The report should be well written with introductory and concluding paragraphs. The paper should be concise with minimal use of “fillers”. In other words, the content of the paper is much more important than the length. References MUST be clearly cited parenthetically in the body of the paper as well as at the end of the paper in a works cited or reference format.
3. Remember-This is an individual assignment. Sharing is strictly prohibited. You also need to be **very** careful about plagiarism. Be sure your citations are complete, and that the information contained in the paper is in your own words.
4. I will not grade a paper that does not have parenthetical citations as well as a list of resources (i.e. works cited or bibliography).

**Attachment 1 Source #1 To Locate the Form 10-K (for your project) AND the Annual Report**

The Form 10-K refers to the required financial statement filings required by the SEC for companies that are trading stock on an organized stock exchange. This information is publically available. To research a particular company, follow these instructions:

Log on to [WWW.SEC.GOV](http://WWW.SEC.GOV)

Click Edgar

Look for Fast Search on the right

Enter the company ticker symbol on the right (It is more efficient to use the ticker symbol. I wrote the ticker for each company on the top of the financial statements

Enter the Find Company button

Search results will appear for all of the company filings to the SEC.

▪You are looking for the most recent Form 10-K. It should have a date of late 2016 or sometime in 2017. Download this to a flash drive or email it to yourself for future use. These forms are typically very long. You will only need to use a portion of it for the project.

▪Open the 10-K and note the table of contents. You will be using the following:

Item 1 (Business)

Item 1A (Risk Factors)

Item 8 (Financial Statements) Income Statement, Balance Sheet and Cash Flow-print these off today!

You are also encouraged to explore any other areas within this document. For example,

The Management Discussion and Analysis section often contains interesting information. This can be found in item 7 of the 10K.

**Source #2 To Locate the Annual Report for your Company-try this today!**

The easiest way to obtain the annual report is to search the company on the web using the company name followed by investor relations. (i.e. Nike investor relations). There is a lot of information here as well. The financial statements will be the same, but many of the disclosures are different. The annual report is used as a tool to attract investors

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| **Criteria** | **Excellent** | **Fair** | **Below Minimal Expectation** |
| Content | * Relevant, meaningful observations were made. Excellent summary of key points of the assignment including company description, primary business activity, competition, risk within this industry, and recent developments | * Some attempt was made to make, meaningful observations and to summarize key points of the assignment including company description, primary business activity, competition, risk within this industry, and recent developments | Minimal effort was made to make meaningful observations and to summarize key points as described in the assignment |
| **Organization** | * Writing is clear, logical and very well organized around the main themes and observations.   ● Writing shows effort to link ideas.  ● Excellent use of required resources | * Writing has minimal organization and lacks focus and purpose * Ideas are not well linked * Used most of the resources adequately | * Writing lacks organization * Ideas are confusing and not well linked * Used few of the resources adequately |
| **Sentence Structure and Mechanics** | * Sentences are grammatically correct with minimal use of filler words * There are no run on sentences * There are no spelling or punctuation errors | * Sentences contain 3-4 grammatical or mechanical problems. * There were 3-4 run on sentences * There were 3-4 spelling and punctuation errors | * Sentences contain 4 or more grammatical or mechanical problems * There were 4 or more run on sentences * There were 4 or more spelling and punctuation errors |
| **Overall** | **A range** | **C range** | **D range or below** |