

THE BOEHLY CENTER

FOR EXCELLENCE IN FINANCE



Raymond A. Mason
School of Business

WILLIAM & MARY



Raymond A. Mason
School of Business
WILLIAM & MARY

mason.wm.edu | (757) 221-4100

BOEHLY CENTER KICKOFF

August 30, 2016

The Boehly Center for Excellence in Finance
was established in January 2014
to provide programs and services for students
(any major, any year)
seeking careers in finance

Boehly Center Staff

Professor Jim Haltiner, Co-Director

Professor Carl Tack, Co-Director

Rita Murphy, Associate Director

Phone: (757) 221-2865

Email: Boehly.center@mason.wm.edu

Website: www.boehlycenter.com

BOEHLY CENTER
FOR EXCELLENCE IN FINANCE



The Boehly Center for Excellence in Finance
is located in Miller 3046



Video Greeting from Todd and Katie Boehly



Primary Areas of Focus



Provide educational and personal development opportunities

Through curriculum and beyond



Explore careers in all areas of finance

Help students connect to world-class opportunities



Nurture alumni connections and mentoring

Benefits both students and alumni



Experiential Learning Opportunities

Paid Research and Teaching Assistantships with Professors
Opportunity to work for the center as a Undergraduate Fellow



Stock Competitions such as Michigan Undergraduate Investment Conference, Georgetown Stock Pitch Conference, CFA Institute Research Challenge. The 2015 CFA Research Challenge team advanced to the Semi-Final of the Americas Competition in Atlanta, GA.

W&M teams have won the CFA state competition four of the last five years.

Boehly Center Fellows

The Boehly Center is proud to offer fellowships to some of its most promising students and alumni. The semester-long Post-Baccalaureate Fellowships and the summer-long Undergraduate Fellowships provide valuable insight “behind the scenes” of Boehly Center operations and allow fellows to engage with students, faculty, and staff through specialized projects at the Mason School of Business.



Lynn Nakamura '15
*Post-Baccalaureate
Marketing Fellow
2015-2016*

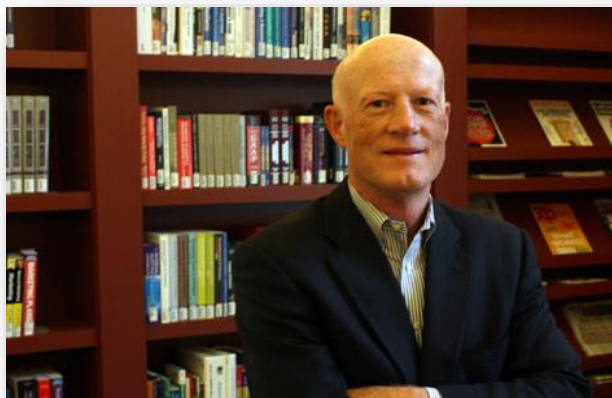


Abbey Doski '16
*Post-Baccalaureate
Fellow
Spring 2016*



Laura Brown '16
*Post-Baccalaureate
Marketing Fellow
2016-2017*

Practitioner-led Finance Courses



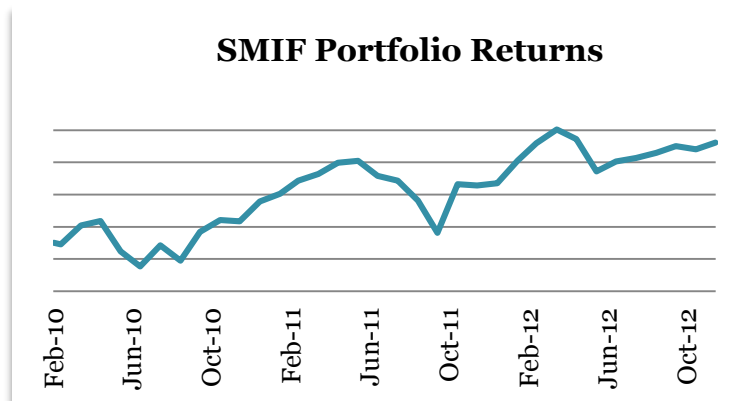
Applied Financial Concepts



Hedge Fund Management



Financial Services



Student-Managed Investment Fund



Develop industry-specific skills



Training the Street offered 2-3 times per year

Singapore Study Abroad Program



**Dairy
Farm**
Singapore

TANGS

 **Pratt & Whitney**
A United Technologies Company

 **JPMorganChase**

 **BOC AVIATION**

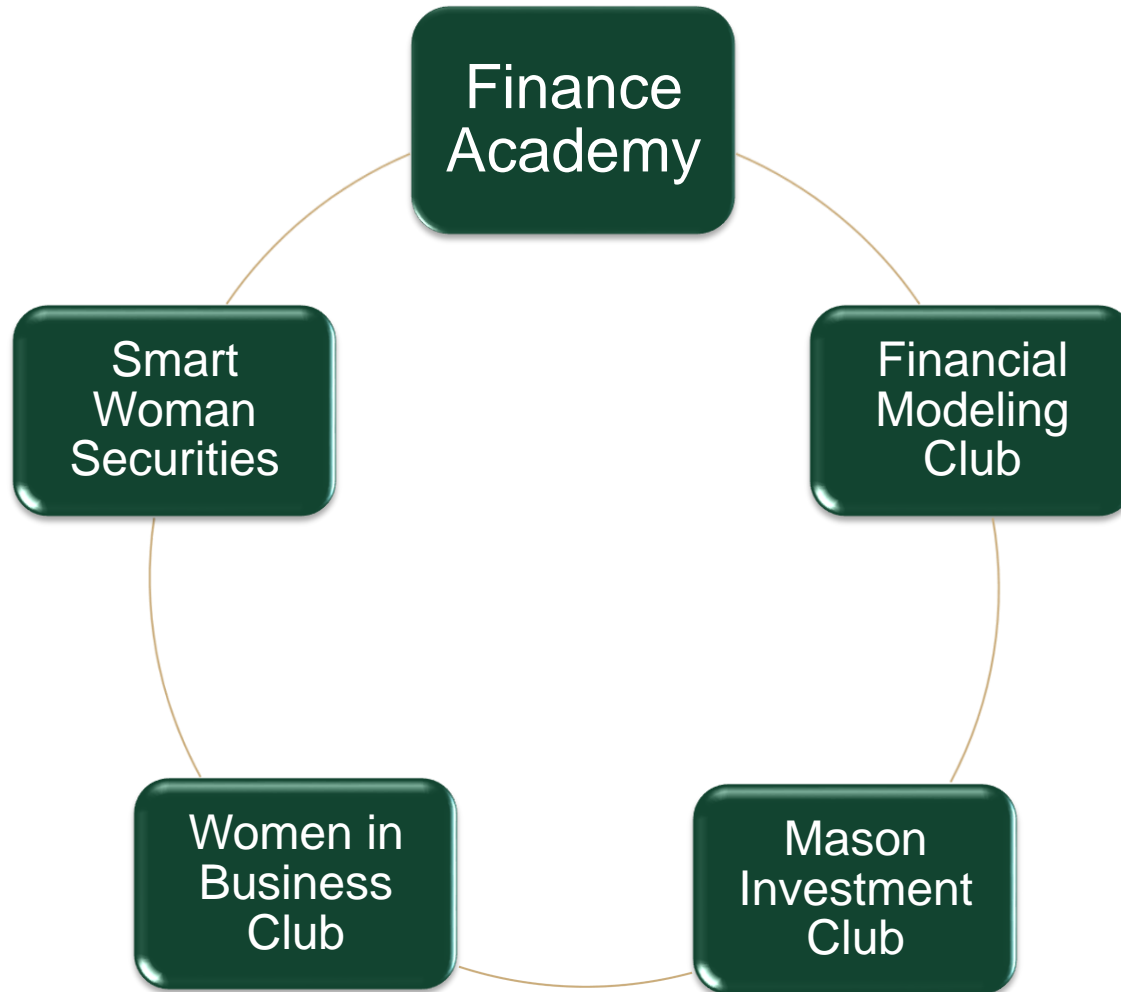
Wildlife Reserves
SINGAPORE

BLACKROCK

Google



Center-Sponsored Student Organizations



Howard J. Busbee Finance Academy

The Howard J. Busbee Finance Academy educates **all** W&M students about careers in finance, while also connecting them with practitioners in the field.

Key events / initiatives

- Kickoff Event: Thursday, September 1
- From DoG Street to Wall Street
- Interview workshops and mock super days

Weekly engagements

- FA Officers office hours (weekdays)
- Periodic programming, presentations from practitioners and alumni (Thursday evenings)



10th Annual From DoG Street to Wall Street Event

Thursday, Sept 22

Keynote Speaker: **Craig Broderick, '81**
Chief Risk Officer at Goldman Sachs

Friday, Sept 23

Sessions on Financial Services, Investment
Banking, and panels on a variety of topics



Interview Prep Resources



FA Interview Workshop

Conor Donovan '15 receives feedback from Neal Chhabra '14



Winners of the 2015 Invictus Challenge Case Competition;

from left to right: Liam Canty, Jason Zhang, Heein Choi and Cecelia Gallagher

Finance Academy Workshops for Interview Prep, student-run mock interviews, résumé reviews, and case competitions sponsored by Invictus and The Carlyle Group will help prepare you for interviews.

Financial Modeling Club

The financial modeling club is a speaker-based club that aims to expose students to the more quantitative side of finance.



The club hosts practitioners and professors who discuss the practical use of financial models in the business world.

Holds lecture-style events and hands' on workshops where students can work through models with speakers.

Mason Investment Club

Undergraduate student-run investment club open to all undergraduate majors on campus managing over \$29K of Mason School endowment.



Learn how to pitch stocks
No finance background necessary

Mentorship
Learn from experienced portfolio managers

Leadership opportunities
Competitions

Michigan Undergraduate Investment Conference
(Fall)

Georgetown Stock Pitch Conference
(Spring)

Smart Woman Securities

Smart Woman Securities is a national organization focused on providing financial and investment education to collegiate women.



**Information Session:
Wednesday, August 31, 7 PM in
Miller 1088**

Interactive seminars and
mentoring initiatives

Hosting seminar series
this fall, bringing in award-winning
faculty and industry experts to
provide women with the necessary
tools to make smart financial
decisions

Women in Business

Women in Business, open to all female undergraduate students regardless of major, prepares members for success after college.



- Kickoff Event: immediately following! Room 1082
- Host guest speakers, panel discussions, and information sessions
- Available for help with interview prep, resume prep, and general career prep
- Co-host events for both men and women of the college

Women's Leadership Summit And Stock Pitch Competition, 25 March



A group of five women in professional business attire are standing and engaged in conversation. They are holding small items, possibly coffee or water, and appear to be networking.



Young Alumni Mentor Program

Connects current students with varying levels of finance experience with recent W&M graduates working in finance

- Utilizes student and mentor surveys to match each student with a specially-picked mentor
- Provides individualized attention to each student
- Facilitates in-depth connections with recent graduates who best understand how to navigate the hiring process



Alumni Networking Nights & LinkedIn



**New York City Alumni Event,
November 17**

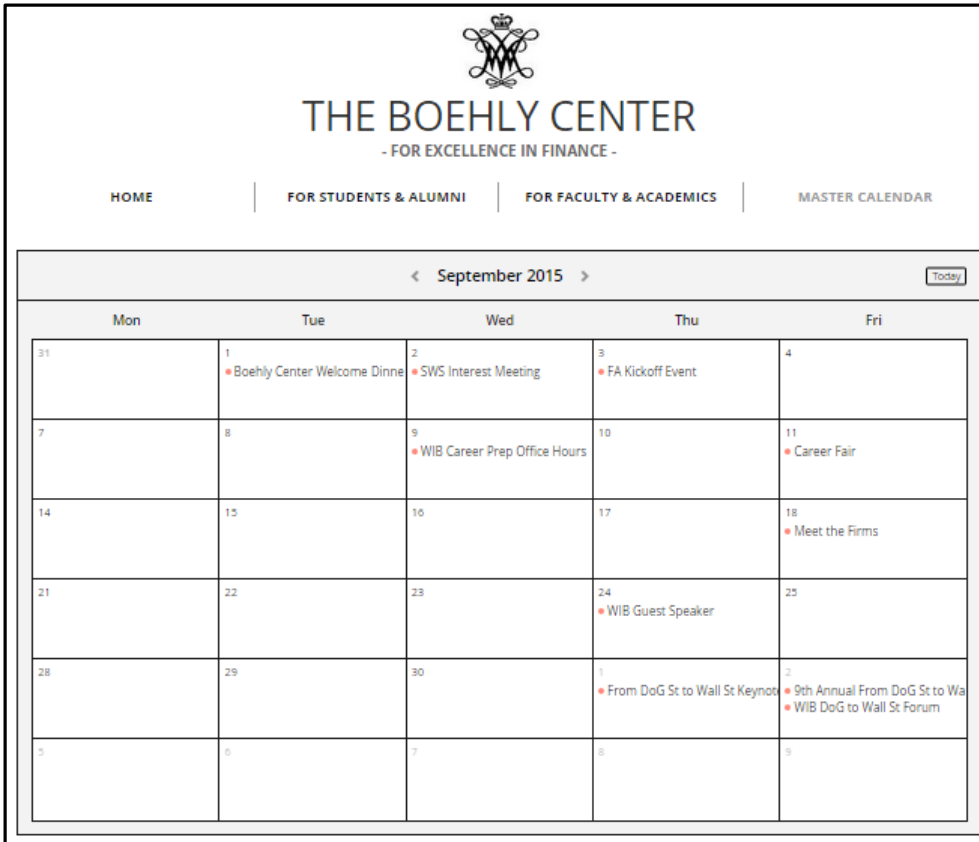
**Networking Nights
in Different Cities**

LinkedIn Site
for job searching and networking

Boehly Center LinkedIn group
750+ alumni and students enrolled

Boehly Center Website

Visit the Boehly Center website at www.boehlycenter.com for more information on student clubs, classes, upcoming events and more.



The screenshot shows the website for The Boehly Center, featuring the school's crest and the tagline "FOR EXCELLENCE IN FINANCE". Navigation links include HOME, FOR STUDENTS & ALUMNI, FOR FACULTY & ACADEMICS, and MASTER CALENDAR. The calendar is for September 2015, with a "Today" button. The calendar grid shows events for each day of the month.

Mon	Tue	Wed	Thu	Fri
31	1 • Boehly Center Welcome Dinner	2 • SWS Interest Meeting	3 • FA Kickoff Event	4
7	8	9 • WIB Career Prep Office Hours	10	11 • Career Fair
14	15	16	17	18 • Meet the Firms
21	22	23	24 • WIB Guest Speaker	25
28	29	30	1 • From DoG St to Wall St Keynot	2 • 9th Annual From DoG St to Wa • WIB DoG to Wall St Forum
5	6	7	8	9

- **Refer to the master calendar to view all upcoming events**
- Learn about major events, study abroad opportunities
- Get connected with current student leaders and alumni

This is a Partnership!

What we need from you:

- Take advantage of resources offered
- RSVP yes or no and attend events
- Recognize you represent W&M
- Professionalism
 - Attire
 - 'Thank you'
 - Smiling faces
- Fill out surveys we send



Thank you. Questions?