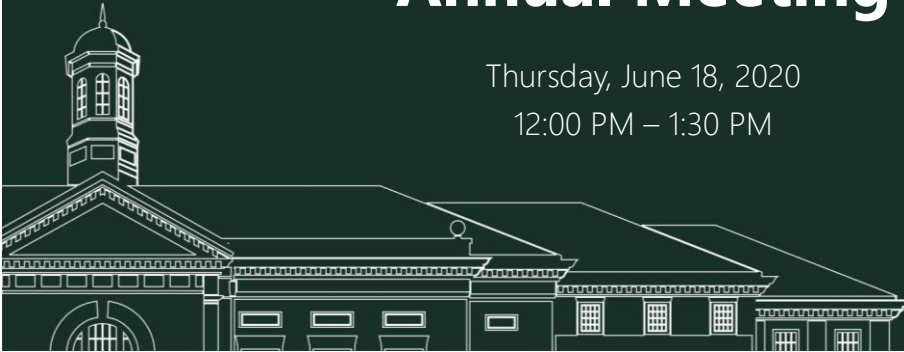




Raymond A. Mason
School of Business
WILLIAM & MARY

Officers' Council Annual Meeting

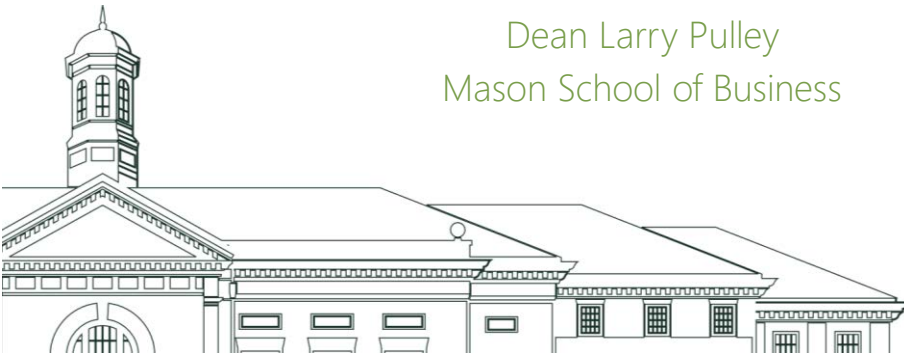
Thursday, June 18, 2020
12:00 PM – 1:30 PM



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School of Business
WILLIAM & MARY

Welcome Remarks

Dean Larry Pulley
Mason School of Business



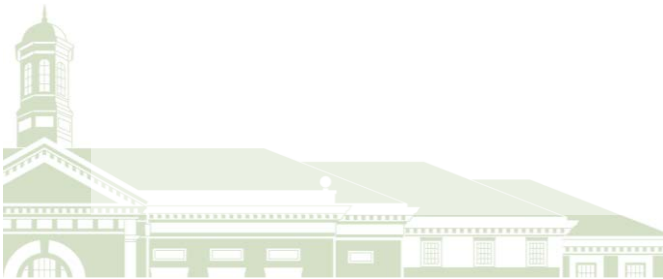
THE
BOEHLY CENTER
FOR EXCELLENCE IN FINANCE

Welcome Executive Director

Jad Howell

Executive Director

The Boehly Center for Excellence in Finance

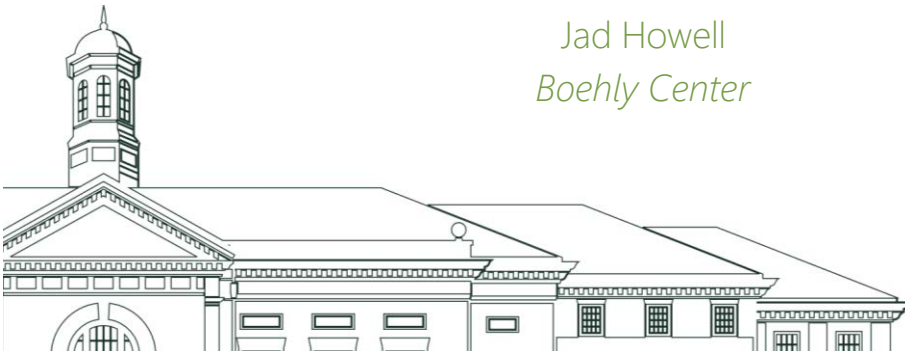


Raymond A. Mason
School of Business
WILLIAM & MARY

Executive Director Remarks

Jad Howell

Boehly Center



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Welcome New Staff

Alice Young

Associate Director of Alumni Relations, Undergraduate & 1-Year Masters Programs

Mason School of Business

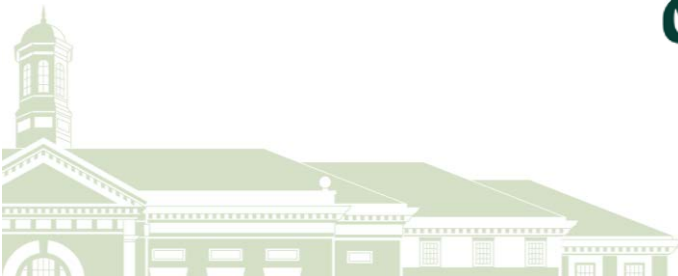
- Program Director for our annual Women's Stock Pitch & Leadership Summit
- Manages strategic engagement efforts
- Plans and implements engagement events for Mason alumni
- Builds relationships with our alumni by learning what made their time at W&M special and coordinates ways to keep our alumni connected to their alma mater, current students and their fellow alumni



Save the Date!

March 26 & 27

W
**WOMEN'S
 STOCK PITCH
 & LEADERSHIP
 SUMMIT**



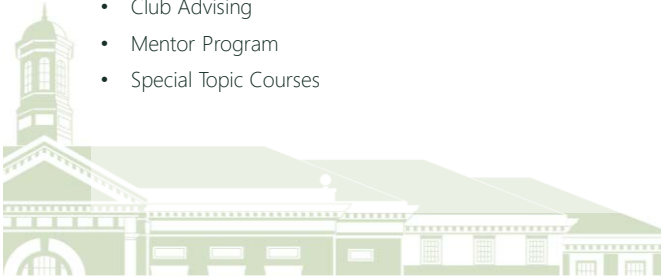
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 FOR EXCELLENCE IN FINANCE

Welcome New Staff

Melanie Weast

*Associate Director Academic Engagement
The Boehly Center for Excellence in Finance*

- Academic Advising
- Career Prep
- Club Advising
- Mentor Program
- Special Topic Courses



Vision Statement

To foster a community of inclusiveness, diversity and enduring identity with the Raymond A. Mason School of Business and William & Mary, while developing the next generation of leaders in finance that will positively impact society.



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Diversity, Inclusion and Equality

- We will promote awareness amongst team members on matters of racism and social injustice
- We will afford students opportunities to learn and lead-out on matters of diversity, inclusion and equality through Clubs, seminars and related events
- We will seek out and embrace underrepresented students and alumni through Center programming



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The Past Year

Survey Results:

- Strengths:
Students and Alumni
- Challenges:
Students' soft skills and broader industry knowledge
- Opportunities:
Educational programming and expanded industry and market reach
- Threats:
COVID-19 (real time) and data considerations



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The Past Year (Continued)

Updated Curriculum

- Strong baseline, enhanced flexibility

Internship and Employment Support

- Mason School Business Institute

Co-curricular Educational Programming

- Research and Public Policy course
- Data Feast

Reinforce Center's Team

- New hires, formal internal advisory committee



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Looking Ahead

Mission Statement:

We are committed to supporting the Raymond A. Mason School of Business at William & Mary in its efforts to prepare future generations for careers and lives of principled achievement in finance that positively impact society.

We accomplish this by providing all William & Mary students with opportunities for personal and professional growth through experiential learning that reinforces classroom theory and through sponsored programs that advance thought leadership, foster critical relationships and promote diversity.



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Academic Engagement Remarks

Melanie Weast

Associate Director, Boehly Center



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DoG to Wall

Virtual/ hybrid format

Panels spanning over the fall semester (September, October)

Significant collaboration with Mason Advancement Team



FROM DoG STREET
D2W
TO WALL STREET

Research & Policy Seminar Course

Inaugural success → offering future policy research courses

Led by Professor John Gilmour, Director of W&M Public Policy Program

Students studied Social Security Reform

- Impacts, formula adjustments, and recommendations



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Strategic Engagement Remarks

Morgan Hutter

Associate Director, Boehly Center



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More Updates!

Boehly Center Employment Status Survey

Finance Company GAP Analysis

Boehly Center Website

Company Inventory Guide



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Mason Summer Business Institute (SBI)

4 Weeks (July 7 – 30)

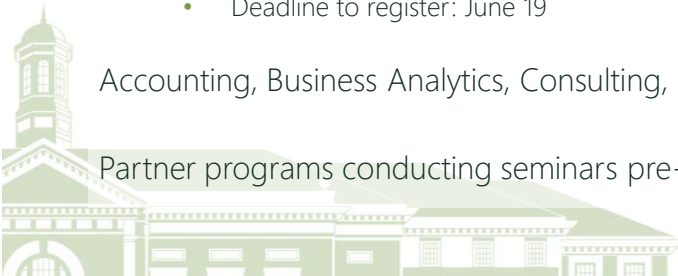
- Tuesday, Wednesday & Thursday
- 12:00 PM – 5:00 PM

Open to all W&M students

- Mason Students: Free as part of Mason fee
- Undeclared/A&S Students: Fee (\$999 before June 15/\$1350 after June 15)
- Deadline to register: June 19

Accounting, Business Analytics, Consulting, Finance & Marketing

Partner programs conducting seminars pre-post SBI



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Daily Schedule

TUESDAY	WEDNESDAY	THURSDAY
12:00 PM: Keynote Speaker 1:00 PM: Break 1:30 PM: Workshop 1 3:00 PM: Break 3:30 PM: Workshop 2 5:00 PM: Day Ends	12:00 PM: Workshop 3 2:00 PM: Break 3:00 PM: Workshop 4 5:00 PM: Day Ends	12:00 PM: Workshop 5 1:30 PM: Break 2:00 PM: Workshop 6 3:30 PM: Break 4:00 PM: Group Activity 5:00 PM: Day Ends

All sessions will be available via Synchronous Zoom sessions



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Weekly Overview

Week 1: Professional Development Week (*All Students*)

- *StrengthFinder, Power of Influence, Building Your Brand, Honing Interview Skills*

Week 2: Foundation of Business Week (*All Students*)

- *Financial Crisis Comparison, State of Economy, Financial Literacy, Non-Profit Giving, Supply Chain, Marketing*

Week 3: Technical Week (*All Students*)

- *Tableau, Alteryx, Python, GIS for Storytelling*

Week 4: Special Topics Week (*Students Break Out*)



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Finance: Week 4

1. Investment & Commercial Banking
2. Investment Banking Divisions (M&A, Global Markets, S&T, Securities, etc.)
3. Corporate Finance
4. Private Equity & Hedge Funds
5. Real Estate & REIT
6. Asset & Wealth Management



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Finance: Week 4

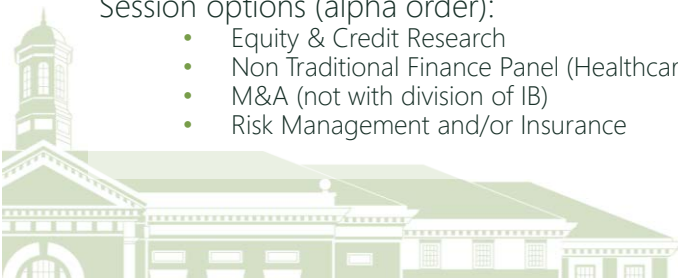
One available 90 minute session.

Based on student interest and survey data propose the following options.

Please vote.

Session options (alpha order):

- Equity & Credit Research
- Non Traditional Finance Panel (Healthcare, Media & Ent., Sports, Hospitality, etc.)
- M&A (not with division of IB)
- Risk Management and/or Insurance



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Cohen Career Center

Kathleen Powell

*Associate Vice President for
Career Development*



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COHEN CAREER CENTER

Updates

Unified Career Pathways Team

Outreach to Students and Alumni - COVID-19 Action Plan

Director of Employer Engagement and Programming

Connections to the Boehly Center

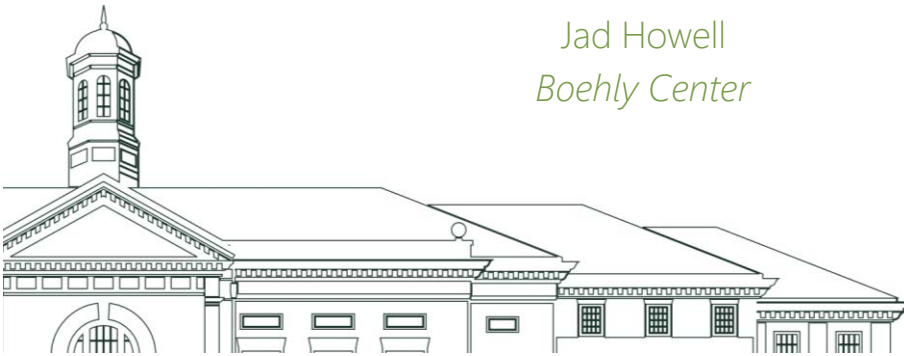


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COHEN CAREER CENTER



The Impact of COVID-19

Jad Howell
Boehly Center



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The Impact of COVID-19

Recorded cases exceed 7 million globally, 2 million domestically

Deaths exceed 400,000 globally, 100,000 domestically

Dense markets, persons with pre-existing conditions disproportionately impacted

Labor markets are in distress

- 21 million have filed for unemployment
- Post-WWII unemployment high of 13.3%

Concerns of second wave as re-entry plans take hold



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The Impact of COVID-19

"The whole open/lockdown 'virus versusism' just feels like a false dilemma. It's not binary; I think people want the economy open 'and' lives saved. The issue is complex, and painful in every direction..."

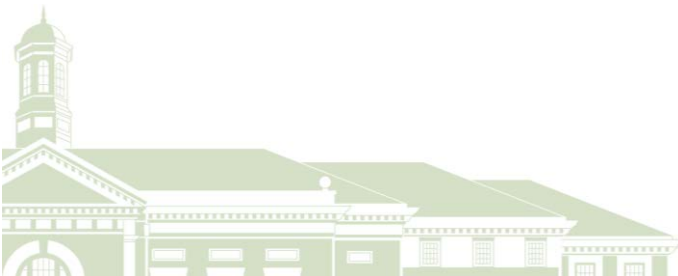
- Jason Gay, WSJ Columnist



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The Impact of COVID-19 (Continued)

What can be done to improve awareness and support of our students during this unprecedented time?



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Virtual Break Outs

Room Hosts:

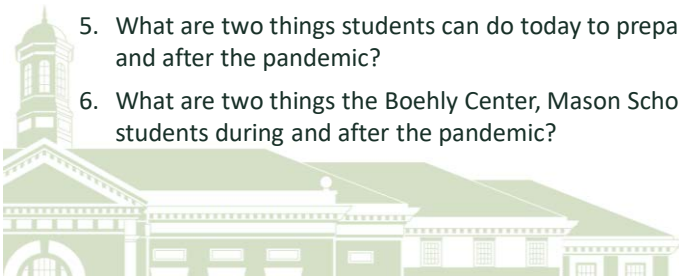
Kathleen Powell, Melanie Weast & Morgan Hutter



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Virtual Break Out Discussion Questions

1. How is COVID-19 impacting your particular industry?
2. What impacts in your particular industry are expected to persist beyond the end of the pandemic?
3. Please describe company re-entry plans (format, timing, etc.).
4. How has COVID-19 impacted hiring in your industry today and into the future?
5. What are two things students can do today to prepare and differentiate themselves for success during and after the pandemic?
6. What are two things the Boehly Center, Mason School and Cohen Career Center can do to support students during and after the pandemic?



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Virtual Break Out Discussion

Survey: https://wmsas.qualtrics.com/jfe/form/SV_5jtXiYDxZIsOzNH

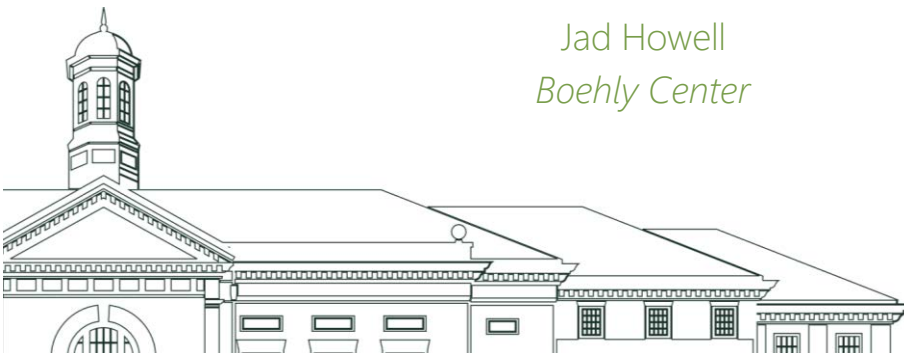


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Closing Remarks

Jad Howell
Boehly Center



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Thank You!

