

# THE BOEHLY CENTER

FOR EXCELLENCE IN FINANCE

CAREERS IN FINANCE PODCAST

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## EPISODE 1: MEET THE BOEHLY CENTER STAFF – ACADEMIC ADVISING

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### Jeffrey Rich

Welcome to Careers in Finance, presented by the Boehly Center for Excellence in Finance at William & Mary's Raymond A. Mason School of Business. This podcast will explore various areas of the financial services industry, career paths in finance, and other practical insights that will help students better understand and prepare for professional success in the field of finance. Be sure to subscribe to the podcast and catch future episodes as we explore the field of finance. And now your host, Jad Howell.

### Jad Howell

Welcome to the Boehly Center's podcast series presented by the Boehly Center for Excellence in Finance at William & Mary's Raymond A. Mason School of Business. I am your host, Jad Howell, Executive Director of the Boehly Center. This podcast will explore various areas of the financial services industry, career paths available, and other practical insights and support today students. Additionally, we'll be discussing real-time issues confronting the financial industry, and in doing so, we'll bring in the experts, today's professionals, to shed light on these issues. In today's inaugural episode, we'll be meeting with the Boehly Center team, including myself, Morgan Hutter, Associate Director for Strategic Engagement, and Melanie Weast, Associate Director for Academic Engagement. We'll be discussing the Boehly Center's mission, its offerings, and how these are a benefit to students who are either pursuing or considering a career in the financial services industry. Be sure to subscribe to the podcast and catch future episodes as we explore the field of finance. Good morning, Melanie Morgan.

### Morgan Hutter & Melanie Weast

Good morning.

### Jad Howell

Welcome to the first Boehly Center podcast series

### Morgan Hutter

Thank you

### Jad Howell

day one.

### Melanie Weast

Thank you.

Jad Howell

Inevitably, this will be an informative and helpful tool for our students as they listen to these various podcasts that will occur over the next several weeks and months. So let's begin by introducing ourselves. My name is Jad Howell, as you both know. But for the listener as well. Before joining the Boehly Center, I worked for 15 years in the real estate industry. I managed institutional portfolios of commercial properties, most recently as a portfolio manager for USAA Real Estate. I now have the good fortune of returning to my alma mater to work with the two of you and as the Executive Director of the Boehly Center and as a clinical professor. So, Melanie, let's start with you. Can you give us a brief description of your background and your current role with the Boehly Center?

Melanie Weast

Sure, thank you. Like you said, my name is Melanie Weast. For those who don't know me, I am the Associate Director for Academic Engagement. And so, my background actually has started in higher education, where I received my master's degree in college student development from Appalachian State. So I've been working in higher ed since 2015 with a focus on civic engagement, leadership, outreach, and working with clubs and mentoring students. And so that has led me into this position where I was recently working with the one year master's program within the Mason School of Business and then transitioned into this role with Boehly. So working one on one coaching students as they're looking for their careers within finance, helping them with the academic side that leads up to that – so helping them find the right courses that will fulfill their needs and what they are hoping to take away from their experience here at William & Mary, as well as working with them on just career readiness and helping our clubs as they push out events and things that are relevant to financial services.

Jad Howell

Terrific

Melanie Weast

Yeah

Jad Howell

Thank you, Melanie. And the one-year programs are excellent.

Melanie Weast

Absolutely.

Jad Howell

I'm myself a MAcc graduate

Melanie Weast

Right.

Jad Howell

of 2005, and so I'm very familiar with that program. Morgan, how about you? Can you give us a brief?

Morgan Hutter

Sure, thanks, Jad. Well, I think I've got to start with the fact that I just bleed green and gold when it comes as an alumna of 2006 grad. So I guess we were overlapping, you know, when we were both here.

Jad Howell

Didn't know it.

Morgan Hutter

Didn't even know it yet. We are so, but I was a member of the lacrosse team here, very proud of that. So like to be involved with the team if I can. And I was actually in a sorority; I was a Pi Beta Phi. So fun if you were either of those things. Come say, hello. Would love to meet my fellow teammates and sisters. I started my career actually not in finance or finance, as you like to say. In the pros like to say so I'll work on that. But I actually started my career in sports marketing. So I've got my master's degree in sports marketing from VCU in Richmond, and I started my career with the United States Golf Association, and it was fantastic. Right. You want to talk about a fun job running championships, meeting great people, working with employers that now ironically, I'm working with, again, just in a very different way.

Jad Howell

How do you find your way from lacrosse into golf?

Morgan Hutter

Well, you know

Jad Howell

Is that an easy jump?

Morgan Hutter

I think that's a thing, right? Sports are sports. And I think you've got a passion. And I think there's something exciting about being around athletes in that mindset and especially on the professional level. And what I actually found was I love the amateur level. So I worked with both the USO Bins. And then I also worked with the amateurs and both terrific sets of men and women. And all of them are fantastic. But the amateurs at the end of the day, they'll really come to you. And it's not about the money for them. Right? I mean, it is one hundred percent about them getting to know you and the course and the experience. And they're bringing the families, and they're thanking you and are so appreciative of the experience.

Jad Howell

Right.

Morgan Hutter

And I think that has also what has driven me to higher education. You know, you kind of find this parallel experience of wanting to help people and that call to service. And I think coming back to the tribe, you know, after a stint with sports was kind of what happened. Right. I missed that. And I miss that community and that desire to really help people that I felt I could pay forward to as an alumna as well. And somebody that had had a very strange path. Right. I didn't have the traditional experience and the traditional path and found my way. And I think that's a good lesson that I try to share with the students. I mean, now, you know, there's a lot of avenues to get to your end game.

Jad Howell

Absolutely, yeah.

Melanie Weast

Mmm-mmm.

Morgan Hutter

And we like to talk about that, too so.

Jad Howell

The campus has a pull, you know,

Melanie Weast

Mmm-hmm.

Jad Howell

I mean, we left 15 years ago, but our hearts never did. And we took it with us and eventually continued to keep pull and pull and pull until we found our way back. So,

Morgan Hutter

Yeah.

Jad Howell

I can empathize with that.

Morgan Hutter

Yeah. So that's key. My role here is working with I'm really the connector. Right. So I like to think of that internally. I'm helping students connect with our Cohen Career Center, a fantastic partner if needed, our graduate center management center that's here. And then I'm also externally connecting to alumni and employers as needed. And sometimes those are the same, and sometimes those are different. And making sure that those are aware of the great programs that we'll talk about today and events that my fantastic colleague Melanie here manages so.

## Jad Howell

Terrific. Thank you, Morgan. Thank you, Melanie. Well, let's get right into it, shall we? If I'm a student listening to this podcast, I likely have several questions, but I think two very basic questions. First, what is the Boehly Center, and second, why do I care? And I think those are legitimate questions, especially for those who are new to the Boehly Center. And so I thought maybe I would just provide a brief overview and answer to those two questions from my perspective and then allow the two of you to similarly answer those questions. So the first, what is the Boehly Center, as we know? But for those listeners today, the Boehly Center was formed in 2014 when Katie and Todd Boehly generously endowed the center. And in fact, many of its programs preceded that date, correct? They've existed for several years.

## Melanie Weast

Right.

## Jad Howell

Built by existing faculty and former directors. So by the time the three of us have arrived, that foundation is certainly in place. And we've we have a track record of supporting students in very meaningful ways that we'll discuss throughout the podcast today. And the second question, why should I care? The mission of the center, obviously, its scope is very broad. It's to capture all students who may have any degree of interest in the finance industry. And we're here to allow them to explore those interests. And as they progress in their understanding and in their development, we're there to walk side by side with them as they continue down that path, ultimately to find internships and gainful employment. And I know we all understand this, but for the listener, you know, the vision of the center really is to create that connection with the student that brings them back. We want to be inclusive and ensure that they feel involved and supported while they're here on campus. And ultimately, that connection, as we described earlier. Right. Will stay with them. They'll come back, and they'll support the next generation of students. And that really is the vision of the center. So with that, why don't I turn the time, Melanie, to you and just allow you to quickly answer those two questions?

## Melanie Weast

Sure. So you did a great job covering it in general. So since I joined back in January of this year, I've just experienced the caliber of student, the alumni that we work with, working with my colleagues in the Mason School of Business, I mean, within Boehly in general. But just beyond and the reach that we're able to have with our students, I think, is unparalleled within the Boehly Center. I think the thing that sets us apart is our ability to connect with students, as you said, on a one on one individual level. So, yes, we are advising and supporting as they're figuring out and determining what their next steps are. But we're doing that intentionally with them. So each time that Morgan, myself, or you, Jad, are meeting with students, we're learning about what they want, what their interests are, what their passions are, and their backgrounds so that we can truly align them with what makes the most sense for their fit. So if they come to us and they think that they're interested in finance, that's awesome. And we can help them work through the different flowcharts that we have, being able to do some personality assessments, walking them through the academic pieces of it. So the courses that they're able to take. But if it turns out finance maybe isn't exactly what they're looking for, and maybe they want to shift to an accounting focus or a marketing focus, we're there to help them figure that

out as well. So if it's something that they any questions that they have, we're able to help narrow in for them. So I think that's what sets us apart and why students would want to come to us so that we can provide this individual support for them, but also the co-curricular piece that's fit that fits in. So we're

Jad Howell

It seems like it's really additive to the relationships

Melanie Weast

Mmm-mmm.

Jad Howell

that you may have with faculty.

Melanie Weast

Right.

Jad Howell

I think organically; students will turn to faculty members

Melanie Weast

Mmm-mmm.

Jad Howell

who have been impactful. But then, in addition to that, faculty frequently refer them to the Boehly Center, correct?

Melanie Weast

Absolutely. I think my biggest referrer was probably Professor Guthrie and Agnew. They send a lot of their students to us after either as they're coming in as first-year students are interested in the business school taking as a pretty major advisor. I'm getting a lot of those students just because they want to learn more about what we have to offer and what we can provide them. And I think we do a fantastic job of being able to do that with students. And it's not just limited to our Mason school. As you said before, any student at William & Mary interested in a career in finance; we're here to help navigate that path for them.

Jad Howell

That's great. Thank you, Melanie.

Melanie Weast

Yeah.

Jad Howell

Morgan.

## Morgan Hutter

Yeah, I mean, I think between the two of you, I'm following two very tough acts here. But I think that the other things I'll add is like so many resources on campus, we're here for our students, period. Right. And everything else is a bonus. And I think we have incredible finance faculty. And I'm so glad we brought that up and that we have one sitting here at the table. And I also think that our I will get into alumni. I know it a little bit, but our alumni are rock stars, and they made what we were able to do with our students. Incredible. And I think the Boehly Center, again, like so many things that students or anybody will experience in life, you will get out of us what you put into us. And at the end of the day, we're all in. Right. We will do whatever it takes to help any student. Any student and that might mean that we have five one hour meetings with a student we're in, you know, and that passion and that dedication and that support, yes, you will find that on campus. That's why William & Mary is so special. But we specialize in that finance-related industry and being able to grow those opportunities. I hope we find we're welcoming. You know, I think you'll find when students are in our office there, or even they're studying, they're chatting. They're coming in to say hi. We welcome everybody to come, explore, grow. We want to help everybody through that process. And at the end of the day, we always have time for finance, and we always have time for you.

## Jad Howell

And that's a good segway into the basic question, how can students find us? So, where are we located?

## Melanie Weast

Great question, because we recently moved. So we used to be located on the third floor of Miller Hall. And now we have moved to a fantastic new space in the second-floor suite 2002. So if you head into the building, go up the stairs and take a right and go keep going to the back of the building and you'll find us. And we've got this great as Morgan mentioned, we have couches, space for students to be, hang out, work with each other. We've got individual meeting rooms nearby. So we have a great space, I think that fosters collaboration and just being able to be in a space that's it's fostering their growth and their learning. So 2002, second floor, Miller Hall.

## Jad Howell

Great, thank you, Melanie. You know one thing, too, I was just going to mention Morgan, you know, to add on to what you just described, which was terrific, is a lot of the offerings that we'll discuss today have bared the fingerprints of existing faculty. Right. That were the former directors, Professor Agnew, Professor Guthrie. They've been very instrumental in helping to design these programs. So there's a lot of interconnectivity between the center, its offerings, and the professors, the faculty in the classroom. And so I think that's really powerful, right, when you're looking at that kind of in totality. And that's really our approach as we continue to grow the center as well, is; how can we best build upon the theory and the instruction that they're receiving inside the classroom through our co-curricular offerings. Okay, so Melanie, maybe ask this question of you, how can students become involved with the Boehly Center?

## Melanie Weast

Sure. We have a variety of ways for students to get involved on a large scale and then down to a smaller individual scale. So we have four clubs that are sponsored through the Boehly Center.

So we have our Finance Academy, our Women in Business, our Smart Women Securities, and our Mason Investment Club. So all four of those clubs any student can be a part of, regardless of their major or minor. It's open to all students, but it's a great way to network with your fellow classmates, but also networking with alumni. They also each and each individual club puts on their own specific events, but there's a lot of cross-collaboration amongst the clubs as well. And so they have their own peer mentoring program that comes out of these clubs. They have various seminars, educational seminars, networking seminars, professional development workshops. That just better a student's ability to present themselves in a professional way, but also, like I said, it allows them to collaborate and network with their own classmates because those are going to be their network moving on. So a student can get involved in those. That's you can get involved via our website. So if you click on our club's involvement, all of the contact information for our clubs and how to get involved will be listed there.

Jad Howell

And maybe just for the listeners.

Melanie Weast

Sure.

Jad Howell

What is that Web site?

Melanie Weast

Sure, so students can go to our website, which is <https://boehlycenter.mason.wm.edu>, and you spell Boehly B o e h l y. So boehlycenter.mason.wm.edu.

Jad Howell

Terrific. One thing I was just thinking about regarding the student clubs is that they're available for first and second-year students. So it's a terrific way to inform and educate students at a very early stage of their academic experience at William & Mary about the finance industry and the various aspects through these clubs. So I know in the past it's been very successful in that regard, and I suspect going forward will continue to be.

Melanie Weast

Absolutely. I think one of the biggest ways students learn about Miller Hall and Mason, in general, is through our clubs. And so to your point, that's exactly how a lot of our students learn about finance is entering those clubs. Our president, Meghana of the Smart Woman Security, she talks about it frequently, how getting involved with the club is kind of her launching point for how she has gotten to do all the things that she's been involved in since she's joined the Mason School of Business.

Jad Howell

And I think you find to that students really look to their peers as mentors. So I think you'll discuss here in a moment some of the mentorship programs that the center offers.



Melanie Weast

Mmm-mmm.

Jad Howell

But in addition to that, being able to ask peers is a very powerful way for them to continue to grow and their understanding and their personal development to be successful.

Melanie Weast

Absolutely. So within each club, there are different positions within the officers who are doing exactly what you described. They're there as a support system for new students, for those students who have questions about generally navigating the business school. Once you get in and then once you've already been a part of the business school, navigating your finance major or other majors for a more general club, but specifically finance within each of those clubs, there's also a collaborative peer mentorship program. And so it's on a two-tier level in the sense that if you are just entering the business school or you want to learn more about how to apply for the business school and just navigate that process, you can be paired up with a peer mentor who's gone through that process either recently or is very familiar with it and can walk you through that and kind of your quote-unquote guide, I guess, to business school. And then there's a second level where you already are in the business school. You've got your major, and you want more information on how to navigate the recruiting cycle, how to how to address in an interview how to engage with alumni. What is it look like to network go to events with one another? So it's a great opportunity to connect with your peers on that peer mentorship level. So we have the peer mentor program that comes out of clubs, but then there's also a separate mentor program that comes from the Boehly Center in general, which is another great way to get involved within the Boehly Center. It's our mentor match program specifically with our alumni. So it's this great system where we have students, they're able to submit their needs, their interests, their background, what their major is, what they're hoping to gain from that mentor relationship. Similarly, with the alumni, they fill out a very similar survey with their professional background and their desire to support a student and what they feel comfortable with and discussing with students regarding their professional experience and how they navigated William & Mary and then based off of a algorithm in the system and us going through based off our knowledge of the students and the alumni, we pair students up with alumni intentionally. And so then they are able to create and establish a networking relationship, a mentor relationship to help them with their professional and personal development.

Jad Howell

And does that the mentor program with alumni began? Is it a semester-long experience, is it a full academic year? When does it begin?

Melanie Weast

Great question. So it actually kicks off at the end of September. So students are right now currently submitting, and if you're interested that go back to that website, and you can find information, and you can register to become a mentor as well as find the guidelines to be a student mentee. So students have a little bit different of a process where we help them with their resume prior to connecting with an alumni. So they feel really strong about their

representation. But that also we're pairing up mentors at the beginning of October. So it closes out end of September. Mentor matches are made in October, and it's a year-long relationship, so it doesn't end at the end of the semester. We have created some more structure and guidelines around the relationship so students are able to submit their mock interviews using the big interview resource found on the Cohen Career Center site so that the alumni can help critique and provide feedback to those interviews, also helping them with their LinkedIn profile. Just those are some two examples of what we would like for those relationships to foster, but that's not limited to that. So we do provide other conversation starters, discussing podcasts or recent articles and things just to continue that relationship. So the student is growing beyond just a personal level, but that they are able to understand how to research current trends and relay that in interviews. So it's a great opportunity if students are interested.

Jad Howell

Absolutely especially today.

Melanie Weast

Mmm-mmm.

Jad Howell

And I think we get a lot of increase ad hoc from our alumni asking how they can support students, especially today. And I think the mentorship program is an excellent way, as you describe

Melanie Weast

Absolutely.

Jad Howell

them, to really practically support these students when they need that insight and that perspective

Melanie Weast

Mmm-mmm.

Jad Howell

the most.

Melanie Weast

Mmm-mmm.

Jad Howell

So would encourage participation by both students and alumni in that particular event. What other offerings and events?

## Melanie Weast

So we've got quite a few. We have within our center; we are able to sponsor teaching assistantships and research assistantships with specific finance faculty members. So those positions open up at the beginning of each semester. So applications will be sent out about those as well as you can find those on our website. We also have student worker positions within the Boehly Center. So if you want to be involved in kind of the day to day of what the Boehly Center does and supporting your fellow students, we have positions available there. We also have a student-led program called the Financial Literacy Program. This program was spearheaded by Professor Carl Tack. And it's an opportunity for students to develop and research financial literacy skills for all of William & Mary students. So it's focus and goal is to provide financial literacy to all William & Mary. So how important it is to be able to maintain your budget and understand? Can I. Is this rent a little bit too much the way I can afford? What is this credit card mean for me?

## Jad Howell

Very practical.

## Melanie Weast

Exactly. Exactly. And so our students are actually developing those modules, obviously, with the oversight of Professor Carl Tack. But those modules is providing them real-world experience in researching what's happening currently to the dollar and then being able to relate that to their fellow peers on a peer level in the sense that they are understanding what each other's needing from first-year experience all the way to your senior year, because those needs may be different. So it's a great opportunity for students to get involved. And if you're not interested in potentially being a part of the program, please attend some of the seminars because that's another way to get involved there. We also have the we also support students in attending stock pitch competitions. So we have we've sent students to the Michigan Stock Pitch Competition every year, which typically happens in the fall. We also have the Women in Investing conference that's hosted by Cornell that happens in the fall as well. And so we have outstanding alumni who support our students to go to these various stock pitch events. We have great faculty support. Professor Hugh Marble. We have executive partners supporting our teams as well. So you're gaining that practical experience on how to research and value stocks and being able to present. We also have the ability to send our students to participate in the CFA challenge. William & Mary has a great winning streak. I guess you would say we've won the past, I believe, 10 out of 12 years. And so at the regional level, they compete.

## Jad Howell

What a track record.

## Melanie Weast

It is it is. Professor Marvel supports our team. So that is something that if you're interested in being a part of, that's actually a class that happens. And so it's over two semesters. So you would sign up to be a part of that class. So if you're interested in learning more about it, please feel free to find my email on the Boehly Center website, and we can discuss that more. But it's a great opportunity. It is a year-long commitment, but in the end, it pays because you win, and it's a great experience.

Jad Howell

So, you know, I think it would be helpful to that very point. Melanie, just to reiterate for the listeners how best to contact you.

Melanie Weast

Sure.

Jad Howell

Because, I mean, we've thrown a lot at them

Melanie Weast

Yes.

Jad Howell

and it's just terrific, right? It's, and that's just a sample right

Melanie Weast

Mmm-mmm.

Jad Howell

of all the current programs and events.

Melanie Weast

Mmm-mmm.

Jad Howell

But how you know, if something resonates with them, how can they communicate with you to get more information apart from the website?

Melanie Weast

Sure. It's my first and last name, [melanie.weast@mason.wm.edu](mailto:melanie.weast@mason.wm.edu).

Morgan Hutter

How do you spell your last name, Melanie?

Melanie Weast

It's fair question, w e a s t.

Jad Howell

And in addition to the Boehly Center's website we've shared previously, students can also go to the Mason School Web page. And on the front page, there's a link to the Boehly Center that will take them directly in case they forget how to spell or that particular link. As the case, maybe.

## Melanie Weast

Right. The last thing I'll say, and I know we've covered a lot, but I didn't want to leave out the focal point of our faculty is our special topics courses that we offer. We also do have practitioner-led courses and series as well. So panel series, for example, Professor Tack, puts together a financial services roundtable that brings professionals back to campus in February, specifically talking about current events, our special topics, courses typically they vary sometimes depending on what's currently going on, the needs that students have expressed. But some of our more regular options are our hedge fund management course, which is taught by Matt Siano, our Applied Financial Concepts, which is by Glenn Crawford, who are both excellent practitioners. We also have a real estate course, special topics, real estate course. There's also risk management that's been taught in the past. So we offer these special topics courses to in supplement of what you're currently learning in your core finance pieces. And so also with this new curriculum, the special topics courses will be something that will be required for you to take. And so you need to take at least one of them. But we have many that you could choose from. So those are options for you as well. And most of the time, the applications will come through. Will come through the Boehly Center. So we'll manage the applications and help you with the registration process. So if you have any questions about getting involved with those special topics courses, I'm the person you would contact about that. And I did have one more addition. I'm sorry, but in addition to the special topics and that the curricular piece, we offer co-curricular trainings as well. So specific to your financial, I guess, literacy in regards to valuation modeling. And so we offer Training The Street, which is a workshop that is very well recognized in the finance field. And it is an opportunity for you to expand your corporate valuation and financial modeling skills. And so we offer that for free for students, which is an incredible opportunity. And it's over two days. So we offer it three times a year, two in the fall, once in the spring. And it is Friday and a Saturday experience. But most of our students, actually, almost all the students who take it, feel that it's extremely beneficial for them leading into their junior year internship. And then a lot of times they'll take it again following.

## Jad Howell

All that information is contained there. And then obviously, they can contact you directly, and you can help as needed.

## Melanie Weast

Absolutely.

## Jad Howell

Terrific. Thank you, Melanie.

## Jeffrey Rich

Careers in Finance presented by the Boehly Center for Excellence in Finance is a production of Raymond A. Mason School of Business at William & Mary. Executive producer is Jeffrey Rich in association with Magenta Text Productions. Find out more about the Boehly Center by visiting <https://boehlycenter.mason.wm.edu>. If you enjoyed this podcast, please share it with a friend and leave us a rating and review on Apple podcast.