

# THE BOEHLY CENTER

FOR EXCELLENCE IN FINANCE

CAREERS IN FINANCE PODCAST

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## EPISODE 7: THE POWER OF MENTORSHIP

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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, everybody, to yet another podcast in our Boehly Center podcast series today. We're excited to have three of the who's who, including Professor Julie Agnew and former alums Alexis Vitali and Rick Hartmann. So we're thrilled to have all three of you here today. We're going to be discussing all things, mentorships, and hopefully, our students who are listening, listening will be able to learn quite a bit from your experiences. And we're, and we're really excited to hear about those today. So so perhaps we just can begin with Professor Agnew. Can you maybe introduce yourself? I'm sure all of us know you, but it would be helpful. And then Alexis will go to you and Rick and then go from there.

### Julie Agnew

So I'm Julie Agnew. I'm a finance professor here at William & Mary. I actually graduated with a degree in economics in nineteen ninety-one from the college. So I had an incredible experience, and it was a kind of a dream to come back here to be able to teach. I did a few things along the way on a Fulbright scholarship after school and then working on Wall Street in New York and in Chicago, then getting my Ph.D. and then being extremely excited to get the job offer to come back here. I'm starting my 20th year here, which is a really long time. And one of the highlights of being at William & Mary was being able to be associated with the Boehly Center, which Jad you're doing a fabulous job running right now.

### Jad Howell

Thank you. You've made it easy for all of us who have come after. Thank you so much for that. Alexis?

### Alexis Vitali

I grew up in New Jersey before attending the College of William & Mary. I studied applied mathematics, finance, and economics. And during my time at William & Mary, I was a teaching assistant, a library associate, and also a part time tutor. And after graduating this past May, I began working as an actuarial analyst for Aon Insurance Solutions in Chicago.

Jad Howell

That's terrific. Thank you, Rick.

Rick Hartmann

Thanks, Jad. I always I never like to follow Doctor Agnew because it's always tough to try to line up or match her accolades. So thank you for putting me here at number three. But Rick Hartman, class of two thousand eight, was a government major from the college. And currently, I'm a vice president and reinsurance broker, Guy Carpenter and Company, essentially responsible for both designing and placing reinsurance program solutions, as well as providing capital solutions for insurance companies. I also lead our sales efforts for the captive client segment, within Guy Carpenter and in my spare time or free time, have a 14 month at home beautiful Charlotte. I hope she is someday a future graduate of the college and also just very passionate about insurance and reinsurance careers awareness.

Jad Howell

That's terrific. Thank you so much, Rick. Eighteen months I remember when I had an 18 month, and he's now 14, almost 15 years. It'll happen fast.

Alexis Vitali

That's what I hear.

Jad Howell

Yeah, well, let's get into it today again. As I mentioned, we're going to be talking about mentorships. And I know, Alexis, you and Rick have had a very positive experience here at the college through all things, mentorship, and mentorship programs. And Julie, you've been so instrumental in helping to stand up some of these programs over the past years. Why don't we just begin by asking the question? And Alexis, we'll start with you. What does the term mentorship mean to you?

Alexis Vitali

Well, thank you. I, I believe that mentorship really is about the ability to share your perspective as both a mentor and as the mentee. Of course, as a mentor, you have a lot more industry experience. You have a lot to share. But also, as the mentee, you know, when you work, especially in this age of technology, we're seeing a lot of things change. And so I think it's really important that both participants are able to share their experience and perhaps share some wisdom about how things might look for the future.

Jad Howell

That's terrific. I really like that. That two-way conversation that needs to occur in order for it to be successful.

Alexis Vitali

Hmm-mmm.

Jad Howell

Rick, how about you?

Rick Hartmann

Thanks. I tend to make a living out of quoting people that are really much smarter than I am. I'll probably do the same in terms of when I was thinking about what a really a good definition of mentorship or mentor so. Oprah actually once said that a mentor is someone who allows you to see hope inside yourself. So I think that mentorship not only allows you to help someone, but it also allows you to grow. And Alexis talked about the combination of sharing wisdom and experience. At the end of the day, I think choosing a career path or going through with hiring processes is very daunting. And I believe that you know, one of the best ways to achieve a successful outcome during that process is to actively seek out mentors and to listen to the wisdom of some of these professionals who've been around the block and who've whom you can benefit from by hearing their own experiences.

Jad Howell

That's terrific. Yeah, they've tried many of these paths themselves and have quite a bit of wisdom and perspective to share. That's great. Professor Agnew?

Julie Agnew

Now, I don't want to follow these two because both of those answers were fantastic. But I guess I would just say I agree with both of them say and than I think of a mentor as really just kind of a guide that has kind of your interest in mind. And I think in the context of what we do with the Boehly Center, it's really someone that helps you kind of discover your passions and kind of that path after college. And it's interesting because it's my perspective as a professor. It's easy to forget once you've gone out into the real world how difficult and non-transparent the real world is when you're a student. Right. What do people actually do on their jobs? And to have someone that's on the other side where everything's actually really clear to be able to help and explain that I think is incredibly useful. And I think that in William & Mary it's such a unique place, I think of as a family. I was surprised when I went out to college after college and talked to people, and they were shocked that I knew my professors by name and had relationships with them. We are a family, and I think that once we graduate, we like to give back. And so I think you also get back. I remember spending a few years on the phone talking to people wanting to get jobs, and it was really satisfying for me to reconnect with the students at William & Mary.

Jad Howell

That's great. That's great perspective. You know, Julie, why don't we stay with you? Because, again, you've really been from the ground up running point building out some of our mentor programs. You mentioned the Boehly Center. Obviously, we do have a mentorship program that has existed for several years. Can you maybe just walk us down memory lane and share how that came about? It sounds like from your prior answer, it perhaps was somewhat organic, but maybe share with us the thought process and how that was developed.

Julie Agnew

Well, you know, it really was something that's probably always informally existed. I was able to get my first job after college because Professor Strong, a faculty member, mentored me. And

then one of our board members, Molly McFarland Perrone, she was a year older, and she was working in the industry I wanted to get into. And I remember sleeping on her couch in New York City the night before my big interview, and she was coaching me and telling me about what to do. And once I got that job, I felt like, well, you know what? I really have to help the next person coming along. And so it was this process that was happening. And when I came back to William & Mary 20 years ago, I realized that we still had it. But there was an opportunity to help more people access this mentorship because I was just lucky to sit next to somebody that turned out to be a great mentor. But what if you don't have that lucky experience where you just kind of organically meet that person? So we started this club called the Finance Academy, and in the Finance Academy, we had a young alumni mentor program. But it was more Rita Murphy who worked for the Boehly Center and myself. We kind of knew the alums. And so when a student came and needed help, we were able to just mentally match people up. But at one point, we realized we really needed to scale this. And we also needed to make sure that if either of us weren't around, that we don't lose that kind of knowledge about the mentors. So I'm very grateful to the Boehlys started the Boehly Center gave us some resources. So the first one of the first initiatives was we had a hackathon at the college, and we used some Boehly Center money as a prize money to create a Match.com. Several of my students were getting married using Match.com, and we thought, oh, we can just use the same kind of architecture to connect our alums with our students. And the student did a great job, and we were able to then get an I.T. person to take what they started and create this Match.com where alumni's would fill out a survey about their interests, whether they wanted to help somebody that really has no idea what they want to do, or they want someone in a specific industry that wants specific help with something. And the students could do the same. And then we just started matching people up. So we beta it, tested it for a while. But I'm really thrilled because from what I've heard this year, it's actually now going to the next level, which is exciting to see.

### Jad Howell

Thank you so much for that. No, that's terrific perspective. I just I was unaware as well about the hackathon. That's a terrific idea.

### Julie Agnew

They stay up all night and hack, and it's kind of cool.

### Jad Howell

No, I mean, that structure that you put in place, though, very much exists today. And it really allows for the efficient administration of that program for our students today. You know, Alexis, I know you've had a positive experience with this particular program. I thought maybe we can now just turn some of our attention to both you and Rick and talk about your experiences going through the mentorship program through the Boehly Center. Can you maybe talk about how you were guided or attracted to that, and what was what made it of interest to you?

### Alexis Vitali

Of course, of course. So I only discovered what an actuary was about halfway through my junior year. And so after I found that, you know, perhaps this is the career that is really right for

me, I realized that I don't know anyone in the insurance industry. I mean, it's kind of hard to, you know, run into people like that. So as Professor Agnew was describing the mentor match program during our class, I realized that it was a perfect opportunity to see if I could find someone, perhaps an alumni within the insurance industry, because, of course, there are online resources. But I really feel like there's nothing that compares to having someone who went to William & Mary, who took the same classes that you did and, you know, who ventured out into the industry, so that that was really what would draw me into it.

### Jad Howell

That's terrific. Thank you. Then how are the two of you connected? So so the algorithm based hacked system put the two of you together, presumably. And what was that like, Rick?

### Rick Hartmann

Yes, before I just wanted to touch on one comment that Julie mentioned to which intrigued me, which was about the mentor program and just mentors in general helping, you discover your passions or your path after college. And I think that's a really important point because as Alexis talks about, you know, thinking about who are my contacts in the insurance industry, and when I landed a job in the reinsurance industry, I had no idea what reinsurance even was. I remember telling a buddy I was going to be working for a reinsurance company. He got all excited, and I was a little bit taken back because I wasn't too familiar with the industry myself. And you know Billy said, I can't believe it, Rick. You're going to be on the phone every day calling people, telling them what a great job they're doing. I said Billy, no, no, no, that's reinsurance. This is this is reinsurance. But in terms of maybe how Alexis and I got put together, I like to think that it's both because we're diehard, passionate Philadelphia Eagles sports fans.

### Jad Howell

Makes sense.

### Rick Hartmann

But now I think, you know, I got to connect with Julie at the college because it was clear her passion and her ability to get things done. I don't think I've ever seen anybody with her commitment to students, with her commitment to execution or eagerness to help. I benefited from some of that eagerness to help. So we launched, I think, the college's first inaugural introduction to insurance and risk management course sponsored through the Boehly Center. So that was kind of my entry into Julie. And then I think also as well as Julie, and perhaps Rita too thought I would be a great fit for Alexis to connect with myself. And it makes the job really easy as a mentor when you have such a talented mentee and makes it really easy to want to help and to help.

### Jad Howell

That's terrific.

### Julie Agnew

May I jump in for a second?

Jad Howell

Please.

Julie Agnew

I have to say that this class that Rick, you organized almost the whole thing. He had a special surprise for us to make everybody very excited and actually had Warren Buffett record a video for the whole class to wish them good luck in the class. So Rick has given a lot back. It's cool.

Jad Howell

That's terrific. That's great. Well, okay. I suppose that's still recorded somewhere. I'm going to have to see that. That's wonderful.

Rick Hartmann

Absolutely. I still keep it handy on my phone. Not that I talk the talk so.

Jad Howell

So then, Alexis, what was it about the mentorship with Rick that made it so successful for you? What is it that he brought and? How did it progress? How did it ultimately become so successful in leading to an opportunity for you in the workplace?

Alexis Vitali

Certainly. So I think the thing that I really appreciated because like like Rick said, I had no idea what reinsurance was. So it was really helpful for me because before our conversations, I had no idea. And then, through all of our chats and our lessons, I really got to see how the reinsurance industry functions. And it really assured me that this is probably the route that I would like to go. But also, I really appreciated how Rick was always so thoughtful with his suggestions. And they're really tailored to my experience and to my background. So it really was a great opportunity for me because I got to learn so much from someone who had already invented the wheel. You know, I could just piggyback off of what he learned. And so I thought that that was really great because this isn't someone who's just fresh out of college like one or two years. This is someone who has seen the industry change. And you know, of course, also then I had the chance through Rick to meet with other alumni as well in the industry and gain even more perspective. So that was also a great pleasure.

Jad Howell

That's great. Thank you for sharing that, Rick. How about you? What was it that Alexis brought that made it such a successful mentorship?

Rick Hartmann

Yeah, I mean, there's her passion, right? And you get out of something, what you put into it. So she was very engaged from the start. She had an eagerness. She had a drive to her. That makes you want to connect the dots. And I think that's a lot of what alumni do. Julie had made an introduction, actually, for me to the CEO of TransRe Transatlantic, which is Mike Sapner, he is also a William & Mary alum. And then, as a result of that, I had a couple of conversations with Mike, whom is just beyond generous with his time, and was able to put Alexis in touch with Mike and the people at TransRe to go up there and meet with their team. But I think, too, as a

mentor, for me, life is both about growth and fulfillment. I always say that progress equals happiness. So I believe that we're meant to grow so that we can often give back. And then, if we don't grow, we ultimately don't have anything we can give. So fulfillment has to come more from just like the next promotion or the next career opportunity or the next bonus check. It's really about, in my opinion, appreciation and contributing beyond ourselves. So, Alexis posed a great opportunity for me to contribute just beyond myself and help a fellow alum and help someone who is passionate about having a career in the insurance or reinsurance industry. I think, too, knowing that she has such an outgoing personality, which is really a unique skill set for an actuary. I knew she was going to be a quick hire for a lot of firms.

### Jad Howell

That's great. Thank you so much, Rick. Yeah, I really enjoyed that perspective, too. You're exactly right. You know, you need to, at some point in life, turn around and give back as you've been given in life and help others along their way. Maybe Julie, let's go back to you. You've had mentors. You've mentioned a few already. How have those relationships progressed throughout your career? Have they persisted? How have you been introduced to other mentors? Do you have other mentors that you've developed throughout your career? If you talk a little bit about that?

### Julie Agnew

Yes, I mean, I still have mentors from when I was a student at William & Mary. And then as I progressed through my career, it's absolutely been invaluable to have people that you trust that if you have an issue or concern or you're considering a new path or career path, that you can bounce ideas off of that, you know, have their best interests in mind. And I one thing that I realize is that I think that's special about William & Mary, is since we're a public institution, that we get people from all different backgrounds, and especially if you're going into business, if you're here at William & Mary, perhaps your parents were not involved in any type of a career in a finance area or something like that. And it's really helpful to have people in those specific areas to help you along the way that can give you advice. And so I, you know, I really benefited when I ventured into new areas that nobody in my universe kind of have experience with. And I would really want to say to students that, you know, you should look for mentors and you should look to help others at all time. I think it is a good karma that comes from it when you help other people and do it not to get anything back from it. You're surprised that in the future, ten years down the line, it'll come back to you in another way. And I've certainly found that where I'm very grateful. There are a lot of people that I might have helped in their career early when they were students. And now they come back ten years later, and they're doing all this stuff from my current students, and I just have such gratitude for that.

### Jad Howell

That's a terrific lead-in into some of the final questions of this podcast today. And, you know, Alexis, maybe I'll go back to you. What advice would you give to students about the Boehly Center mentor program and just mentorships in general?

### Alexis Vitali

So I would say for mentees that they should be open-minded about different career possibilities. I'm so grateful for Rick for introducing reinsurance to me and really helping me be that shining

light for me. But, you know, if I had a close towards reinsurance, then that probably never could have happened. So I would have I would say definitely for mentees to be open-minded. You never know until you learn more about that experience and about that career path. So don't rule anything out. And then also, I'd say be proactive. There are so many times that you might have a question, and you may not know what to do. And it's hard to find the right resource. But, you know, mentors, of course, maybe busy, but they are always they're there for you. And I'm so grateful for all the times that Rick has been there for me. So, you know, I'm sure that with a bit of time, you can always find a helpful answer. So that would be my advice.

### Jad Howell

That's great. Thank you so much, Rick. How about you? What advice would you give to William & Mary students today about mentorships and the importance of them in their education and throughout their careers?

### Rick Hartmann

I think we heard two great points, right? One from Alexis, in terms of being open-minded, I think that's really critical. And Julie had another excellent observation in terms of seeking out mentors who have your best interests in mind as well. It's just a benefit that William & Mary offers as a public institution because you get students and individuals from all different backgrounds. Here I am, a government major who's been actively involved with the Boehly Center, Dog Street to Wall Street program, and the Mason School of Business. So you certainly have to be open. But I kind of look at in terms of maximizing mentor, mentorship in four buckets, one is really being from a mentor perspective. That is, one, be eager to help. The more eager you are to help, I think, the more comfortable the mentee becomes. And that allows for just really more open and honest conversation. I think secondly, don't expect perfection, right, Alexis? I think we had one or two hiccups with Zoom calls at first and totally could have shut down and thrown off, but maybe the pandemic's probably taught us a little bit more patience with technology, but if you expect perfection, you'll end up judging yourself or the mentee and that really benefits neither of you. Third, think of it as an opportunity to become a learning machine. Learning is really a two-way street. You have the mentor match program enables you to learn what's important to students, what's important to the future talent, future leaders. So I think it affords the mentor an opportunity to learn as well. And then lastly, it's execution, and there's nobody better here than Julie, as I mentioned earlier, in terms of execution. But as a mentor, you have to hold yourself accountable to any action items or follow up items that come out of these conversations. And I think Alexis did a great job, too. Right. So you're going outputting your own name and your brand on the line with some of your contacts, some of your mentors in your respective industry. So when the mentee is representative of what you think the company is looking for, when they're responsive, they're engaged. Not only does it benefit them, but it also benefits you because it adds to your credibility.

### Jad Howell

That's terrific. Thank you so much. This has been really helpful for me, for my part, selfishly, and I, I, I'm sure it's going to be for all the students who will listen to this podcast in the future. I think, you know, mentorship to me is to create this safe place. Julie, you Professor Agnew, you mentioned it. You know, someone who you can confide in and also receive constructive feedback. And I think, you know, that's been alluded to as well on this podcast is it's an opportunity to not only have introductions be made and to be coached as to a particular area of

an industry, but it's also to receive constructive feedback on what you can do to improve yourself again within a safe space where, like you mentioned, Professor Agnew, they have your best interests at heart. We're thrilled about the program, Professor Agnew, that you've helped launch. We're so thankful, Alexis and Rick, for your involvement in that and holding it up on a pedestal so others can see the successfulness of it. At the end of this podcast, we will inform all of our listeners how they can participate going forward in this particular program through the Boehly Center. But for now, thank you, everybody, for your participation today. It's been incredibly helpful.

### Jeffrey Rich

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