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BOEHLY CENTER**

FOR EXCELLENCE IN FINANCE

Raymond A. Mason
School of Business
WILLIAM & MARY

Monthly Happenings April 2021

Welcome to The Boehly Center Monthly Happenings newsletter!

Executive Director Scoop

This past month we witnessed the 5th installment of the William & Mary Women's Stock Pitch & Leadership Summit, hosted by the Raymond A. Mason School of Business. While the event necessarily occurred in a virtual environment, participants didn't miss a beat in terms of their level of engagement, motivation and skill exhibited throughout.

During the Leadership Summit, participants were treated to an evening with Josephine Umana, Senior Vice President Chief Operating Officer, Investments and Capital Markets of Freddie Mac, who shared select experiences and words of wisdom from her years of industry experience. Additionally, Cindy Davis, Executive Vice President and Chief Brand Officer of Bed Bath & Beyond, shared thought-provoking insights that led to individual brand recognition.

The Stock Pitch was attended by 18 teams from highly regarded universities who for weeks prepared and identified, researched and presented a "buy" recommendation on a stock to a group of distinguished judges. While these teams competed for cash awards, they more importantly represented their university with valor and undoubtedly grew personally from the experience. The University of Texas at Austin captured first place, University of British Columbia second place, Johns Hopkins University third place and University of Alabama fourth place.

The mission of the event is to inspire and promote undergraduate women, while allowing them to explore their potential. As another successful event came to its conclusion, it became apparent that the collective effort of the participants and support of many across the Mason and W&M community had once again fulfilled that mission.

**Name:** Ian Creelman**Major:** Finance



Graduating Class: 2021

Previous Internship: Investment Analyst at Cedar Hill Capital Management

Upcoming Job: Private Bank Full-Time Analyst Program at J.P. Morgan Chase

How has the Boehly Center impacted you?:

I am the Team Captain of the William & Mary Men's Gymnastics Team. My journey with the Boehly Center and Ms. Hutter

specifically started shortly before Winter Break. We had an initial call that was high-level guidance on how to approach a job search. From there, she connected me with several alumni and that began to frame how I was thinking about my career coming out of undergrad. The alumni were incredibly helpful in giving advice to me that I took into great consideration. The Boehly Center and I met several times over the next month's sometimes with little notice, but they always made themselves available and were willing to help specifically around the time of my SuperDay for J.P. Morgan. JPM gave me only a few days notice on when my SuperDay was and with such a busy schedule, the only day I could do a mock interview was the weekend. Despite that, Ms. Hutter was there to support me once again and we ran through a full mock interview on a Saturday. She gave me her full attention throughout and provided insightful feedback afterwards. The Boehly Center really went above and beyond in supporting me throughout my job hunt, and I am incredibly grateful for their mentorship.



William & Mary celebrated One Tribe One Day – its annual day for giving on Tuesday, April 13! If you missed One Tribe One Day and would still like to support the programs, events and trainings that the Boehly Center offers our students, [please click here and donate today!](#) Your gift, no matter the size, will count toward helping the Boehly Center to continue its mission to develop the next generation of leaders in finance that will positively impact society. Help us **Elevate, Engage, Educate, Empower & Employ** William & Mary students interested in financial services by [supporting the Boehly Center](#).

The Boehly Center wants to recognize the hard work and dedication put forth by the following students as they represented William & Mary at the **Harvard Global Case Competition!**

A big thanks to the alumni mentors that assisted our students as they prepared for the competition: Abraham Haji, Tyler Bernier, Adam O'Connell, Caitlyn Farr and Ana Murias Roman.



Myles Marino '23



Bobby Brooks '23



Max Moore '23



Rohan Shah '23

Team Name: Crim Dell Capital

Project: Harvard Global Case Competition (HGCC) is an international investment banking case study contest where a small team conducts comprehensive market, company, and financial analysis to assess and solve an M&A deal. For our final deliverable, we submitted a 84 slide pitch deck evaluating the semiconductor industry and a potential merger between Nvidia and AMD. In our solution, we rejected a merger between the two companies and instead proposed that Nvidia instead acquire AI tech company Graphcore.

Testimonial: Honestly, it was tough. We came in knowing nothing about semiconductors, but I'm very grateful for an opportunity to learn and practice meaningful skills like financial modeling, researching/interpreting financial data, and teamwork in a

competitive setting. I am very appreciative of the time and dedication of my teammates, without them this wouldn't have been possible. Although we weren't finalists, you'll be sure to see us competing again next year!



CONGRATULATIONS to not only the finalists of our Women's Stock Pitch & Leadership Summit, but to all of the participating teams! We were impressed by all of the pitches that were presented, each team's ability to adapt to this virtual landscape, and the hard work each team put into this competition.

We also want to say thank you to our partners and professional volunteers who made all of this possible and successful!

Congratulations to our first student to reach Level 1 of our Incentive Program!



Rohan Shah '23

Major: Finance, Concentration in Innovation and Entrepreneurship

Why did you decide to register for the program?

I decided to register for the program because I thought it was a great opportunity to get rewarded for involvement in events I would have normally attended. A lot of the career development events that the Boehly Center hosts are very helpful and I believe that it is a good incentive to encourage engagement in these programs, especially in students with an interest in finance or business.

How do you feel about being the first student to reach Level 1?

It's always neat to be the first to do anything, hope to see more of my peers participate in the program!

What has been your favorite Boehly Center event/program that you have received points for?

So far, my favorite Boehly Center event has been the Wall Street Program where I was able to network with alumni at prominent investment banks and private equity firms. These connections are especially useful in learning more about the industry and trying to secure a job after graduation.

[Visit our website to find guides and videos on how to sign up, earn points, and collect prizes!](#)

Peer Mentorship Program

The Peer Mentorship Program kicked-off its spring cohort of first-year and sophomore student-mentees and upperclassman student mentors during the first week in February 2021. In the past year, the program has grown from about 20 students to over 70 students collectively, with students represented from all four business majors.

Coordinated and managed by Smart Woman Securities, Women In Business, and Finance Academy Boehly student club board members, the Peer Mentorship Program matches high-achieving upperclassmen who have professional and advanced curricular experience with engaged students who are seeking to follow in similar career footsteps. Its aspiration is to create an expansive, yet personable, program that allows William & Mary mentors the opportunity to give back to the tight-knit business school community and give mentees the chance to receive guidance from their older peers.

Each semester, the program takes place over five weeks and each week focuses on a single aspect of professional

development, such as resume writing and behavioral interviews. The program coordinators provide the mentors with supplemental materials and guiding discussion questions, and the mentees also have access to group workshops.

The Boehly Center wishes the mentees and mentors of the Peer Mentorship Program an excellent semester of connecting ahead!

Students, if you're interested in being a mentor in a future semester, please email the Boehly Center at boehly.center@mason.wm.edu



Recent Episodes:

Market Research - Jad Howell welcomes Seth Carpenter, the U.S. Chief Economist at UBS. Seth shares his career trajectory in economics, from his undergraduate studies at William & Mary, to his graduate studies at Princeton; working at the Federal Reserve and the private sector. Tune in today to hear Seth give advice on what undergraduate students should do to prepare for a career in economics, either in the private or public sectors.

Women's Stock Pitch - Host Jad Howell welcomes Alice Davison from The Capital Group to talk about the Women's Stock Pitch and Leadership Summit, how it differs from other events of its kind, what students can get out of it, and how it is more than just a networking and recruitment event.

The Power of Mentorship - Jad Howell welcomes Professor Julie Agnew, as well as alums Alexis Vitali and Rick Hartmann to talk about all things mentorship, including how the mentorship program at the Boehly Center got started, how mentorships can benefit students, and how to truly take advantage of a mentorship opportunity.



BOEHLI CENTER WEEKLY EMAIL:
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Each Thursday, the Boehly Center provides updated internship/job opportunities

BOEHLY CENTER WEEKLY EMAIL:
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