

THE BOEHLY CENTER

FOR EXCELLENCE IN FINANCE

CAREERS IN FINANCE PODCAST

EPISODE 14: FALL PROGRAMMING & RE-OPENING BOEHLY CENTER

Jeffrey Rich

Welcome to Careers in Finance, presented by the Boehly Center for Excellence and Finance at William & Mary's Raymond A. Mason School 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, Morgan Hutter.

Morgan Hutter

Well, welcome to the Boehly Center for Excellence in Finance Career in Finance podcast. Today's prepared-for-success podcast is about the relaunch of the Boehly Center and fall programming. We're happy to welcome our guests and new members to the Boehly Center team. Dannita Trice, who's our Associate Director of Academic Engagement, and Dezire Morris, who's our Administrative Project Coordinator. Welcome, Dannita and Dezire.

Dannita Trice

Hi, Morgan. Thanks for welcoming us today.

Dezire Morris

Hi, Morgan.

Morgan Hutter

We're glad you're here. Thanks for being here. Since we have so many new faces to the Boehly Center, I'm going to ask both Dannita and Dezire to just spend a minute or two introducing themselves. So why don't we start with you, Dannita?

Dannita Trice

Thanks, Morgan. Well, really quickly again, my name is Dannita Trice, and I'm the new Associate Director for Academic Engagement in the Boehly Center. I come to you being someone who just really has throughout my career loved helping other people to get to their next level and to make progress in a future-focused way. I have a background in campus recruiting both in Big Four and in regional accounting firms, public accounting, and also have a background in career services. So really excited to be a part of the team. And what I'll be helping to do with all of you students is to help you identify what path you want to be on in finance and connect you with those opportunities, so it will turn what you're learning into the classroom and to hands-on experience. So really excited to be here.

Morgan Hutter

Thanks, Dannita. You have hit the ground running, and it's just so fantastic that we stole you from the corporate world. So welcome, and we're glad you're here. With that alternate to Deziere. Deziere, would you like to introduce yourself?

Deziere Morris

Yes. So hello. My name is Deziere Morris. I'm the administrative project coordinator of the Boehly Center, and I offer logistical support for our signature events and programs. I also support the Centers marketing initiatives as well as offer management support to our four Finance clubs. As a quick background of myself, I recently transitioned to William & Mary from Virginia Tech, where I offered administrative support to educational initiatives within the University library system. So similar to Dannita. I really get a lot of joy for offering support to students and educational initiatives and just assisting students in getting and reaching their success and their goals.

Morgan Hutter

We're lucky to have you. Thanks, Deziere, and thanks for coming over from Tech. We appreciate it. So glad you're here. So the Boehly Center has had a very busy summer planning, as we usually do, getting ready for the fall and our return to campus. So assuming all goes to plan, we're very excited to relaunch the center and welcome students back into Miller Hall. The Boehly Center recently moved to suite 2002 in Miller Hall, so we hope our listeners will come visit us. And as usual, we have a busy fall event schedule and a busy recruiting season. So I know we're working closely with the Cohen Career Center and getting ready for many of the alumni listening. I know many of you've come back and for our students listening, make sure you keep checking what's going on because there is a lot happening in the fall as usual. So get your calendars out and get ready to save some dates. So, Dannita, a large part of your job is academic and career exploration advising. So the students are interested in learning more about their careers and their interests in financial services. How do you recommend they contact you?

Dannita Trice

For sure. First of all, welcome again, students. The way to contact me is through email or through our Boehly Center website. My email address is Dannita, that is D-A-N-N-I-T-A period Trice T-R-I-C-E at Mason dot WM dot edu or go to our website, which is Boehly Center dot mason dot wm dot edu. From there, you will be able to go to our Boehly Incentive Program app and, from there, request an appointment to meet with me. I want to say that if you are a student on campus, whether you're first year or whether you are in your senior year, you absolutely want to meet with us in the Boehly Center if you have even an interest in financial services. A wonderful success story that I'm really excited about right now is that a student who hasn't even started here who is coming into their first year here at the University has already reached out to me to start their resume development process. And what's going to happen when it's time for that sophomore year recruiting cycle. That individual is going to be more than ready because they know all of the things and how to get started on their career path. So long story short, reach out to me through email and by scheduling an actual appointment through the Boehly Center app. And guess what? You'll get points for doing that as well. And I'm sure we'll talk a little bit more about the incentive program later.

Morgan Hutter

That's great, and you likely mention it. But the Boehly Center any student at any point of where they are in their cycle. So I know we have this great story of an incoming student coming, but if a student is a second-year or junior or senior and if they're in any major or minor, can they still come to you and to the Boehly Center?

Dannita Trice

Yes, please. Strongly encouraged.

Morgan Hutter

Great, so kind of start wherever you are, wherever you are as a student, just come contact us, and we'll help you on your journey. So I'm going to stay with Danita for a minute. And you started talking about some of these great things that we can help them with. But what are some key events our listeners should mark on their calendars for the fall as we continue our fall programming?

Dannita Trice

So right now, as Morgan mentioned, we have so many programs on our docket, the first of which being Training the Street. So that is a series of workshops that will help you with valuation and also financial modeling. So want to sign up for that. Also, we have our Boehly Center kick-off that will be coming up, where you can learn more about the Boehly Center. We're just scratching the surface right now today, everyone. So come and learn more about how we can assist you along your journey. Also, we have the From Dog Street to Wall Street Conference. We are so excited to put that conference tag on there this year. Dog street to Wall Street has been around for years, and what we are doing this year is we are adding some hands-on case study experiences, getting you more exposure to different avenues in finance, and making it a one-and-a-half-day experience. So you certainly want to get signed up for that. We also have our Sequel SQL training that will be coming up. And also, we have specialty courses. So I mentioned this so early on because we're planning for spring right now. So ensure to keep watch because we will be advertising for you to submit applications for those specialty courses so that you can be considered for them if they have an application process involved versus you are being able to simply register for the course. So that's a snapshot of what we'll be doing.

Morgan Hutter

That's fantastic. Thanks, Dannita. It's so wonderful for those that aren't familiar with the Boehly Center that might be listening that so many of these events are exploration or educational. Right. We want to be sure that our students understand the different avenues of finance. Take that opportunity in those special topics courses to take advantage of maybe what's not in the core curriculum. Right. Take advantage of some of those things that you might want to know when you graduate and learn them now, so you're better prepared. So it's definitely a busy fall ahead a lot of programs that students can get involved with through the center. So thank you for sharing that. I'm going to turn now to Dezire, who helps manages our four clubs. Dezire tell us a little bit about the clubs and how students can get involved there.

Dezire Morris

Sure, Morgan. So the Boehly Center oversees four student clubs, which, much like our events, are free and open to all students. Students are also welcome to join more than one. Our clubs offer a variety of programming to include career readiness with like resume reviews and LinkedIn preparation to guest speakers on unique topics to competitions and experiential learning. Finance Academy is our largest club and the catch-all, for a lack of a better word. Launched around 2006, they are the brainchild behind our Dog to Wall event. So Women in Business, spun out years later from Finance Academy and focuses on all aspects of business and helps to run our annual Women's Stock Pitch and Leadership Summit each March. The Mason Investment Club manages a real portfolio with professor Hugh Marble. So if investments in banking is your main area of focus, this is where you want to be. Last, the Smart Women Securities is a national entity, and we have a chapter here at William & Mary. They have a series of topics that cover throughout the semester.

Morgan Hutter

A lot of clubs. So it sounds like there's a lot of ways that students can get involved. As you mentioned, they can do more than one. And for those listening, our clubs meet each week normally during the school year, so they each have a different night. So make sure to get involved with one or two or all of them. As you interest, Dezire shared, they're open to all students. Wow, Dezire, that is great. So how do students get involved if they want to join a club?

Dezire Morris

So it's easy. Just email myself at Dezire dot Morris at mason dot wm dot edu, that is D-E-Z-I-R-E dot M-O-R-R-I-S, or at boehly dot center at mason dot wm dot edu. That is B-O-E-H-L-Y dot Center at mason dot wm dot edu. And we'll get you on the Listserv – each club post events on different nights of the week. So make what you can. And don't forget if you come to a couple events and you can get points in the incentive program towards prizes.

Morgan Hutter

This is great. I know many of our students and listeners, and our alumni listeners we're all parts of our clubs. There's also opportunity for leadership experiences within our clubs. So if you'd like to have a leadership experience and be a part of those, we can get you more information. So Dannita, I'm going to come back to you for a second. Are there additional resources offered through the Boehly Center for students?

Dannita Trice

There are. We have several mentor programs, and we also have opportunities for employment and, as we mentioned earlier special courses. So the peer mentorship program that is so that you can be connected with a peer. So typically, we pair our first year and sophomores with our junior and senior students so that our earlier on students will have a road map on what they should be doing as they're preparing to apply for the business school. Application, et cetera, et cetera. This is open to all majors. Also, we have our Mentor Match program. So this connects current students with alum of the University. So this is an opportunity for you to get your questions answered about courses that you should take, experiences that you should be doing leading up to your career, and awesome opportunity to practice networking as well. We have

our Financial Literacy Program, so we have an awesome group of students that we recruit each semester, which we call peer educators. And they do research on different finance topics. They host programs through the Boehly Center. And also, if you are a club and you want our peer educators to come out and give you some tips, then please let us know through the Boehly Center as well. So please be sure to attend the programs and think about becoming a peer educator yourself. We also, as we mentioned earlier, has special topics courses. Please keep watch on your email. Get on to our email list, as Dezire was sharing about earlier, so that you'll know about all of the different programs that we have available to you, as well as internships and full-time jobs as well. And then we have opportunities for Research Assistance and Teaching Assistance as well. So simply reach out to us so that you can complete an application. And as those needs become available for our finance faculty, you'll be considered for those.

Morgan Hutter

So a couple of things I want to ask. So if there's alumni listening and they're interested in joining the Mentor Match program, how much of a commitment is it?

Dannita Trice

Say if I were to boil it down to a number of hours per year, it may be about 5 hours per year out of the whole year. So there are two check-ins with students within the fall semester, likely starting in October. And then, there are two check-ins with students in the spring semester as well. We challenge our students to also complete activities such as an online interview preparation system that you will check out through a link. And so that might take 30 minutes to an hour of your time to review and give feedback on as well.

Morgan Hutter

And Dannita, you mentioned the Financial Literacy Program, and you mentioned that it was open to clubs. So did you mean just our four Boehly Center clubs, or is it open to Greek Life or other entities on campus that might want to learn more about financial literacy?

Dannita Trice

All of the above and beyond it applies to. So any of our Greek life, any clubs across campus, any entity across campus. And I'd even say externally as well if there are opportunities. We are open to come to you and give a presentation design around literacy. Financial literacy.

Morgan Hutter

Sure, sure. Thank you so much. And then I'm going to give you a minute here to tee up our incentive program. So can you give a highlight about what the incentive program is and how students can get involved?

Dannita Trice

I sure can. So our Boehly Center Incentive Program, it's an opportunity for you to earn prizes for all of the engagement you're going to do anyway. So we are really dedicated to helping you and all students see the importance of the networking events, the hands-on events that we have for you to develop in the financial services industry. And so really that's the premise of the program, how it works is that you would download an app to your phone or either access the platform through your laptop or other mobile device or computer device. And you must first

sign a memorandum of understanding to say that you understand what it means to be an upstanding member of the William & Mary community and that you are going to commit to engagement to help you to progress through networking, hands-on experiences, et cetera, and opting in or out of having your information shared with employers as well. And then from there, as you're going to different events that Boehly's hosting, that the Cohen Career Center is hosting, or any other School of Business related events. We ask of you to log those events in an event journal, which will lead to your receiving points, which will at the end, depending on where you land. As far as accumulating points, you will be incentivized in the end with prizes. For example, our first semester was last semester, where we rolled out the program and upwards of 70 students to start. Were able to receive a Boehly Center mug, were able to receive a special experience to talk with Boehly, Todd Boehly. So there are so many experiences that students that engage in the program are able to go with. So you can go to our website to learn more about how to download the app, how to get started, how to log points, and of course, you can reach out to us in the Boehly Center if you're experiencing any challenges or you have questions about what qualifies or how to get started.

Morgan Hutter

Thank you so much for teeing that up. I know our hope with the prizes is they can become more experiential, maybe some trips things of that nature. And then there's also for those that get through the levels we have different levels, so those that get through different levels and get those bonus points. Once they complete levels, they get a resume recognition as well. Right. So the hope is that they have something that they can put on their resume to show that they are engaged. They're representing William & Mary with the professionalism, accountability, their community involvement. So definitely make sure to check out the website or contact Dezire, Dannita, or myself if you'd like to learn more about the incentive program. Thank you, Dannita. That's great. I appreciate you taking the time to share all that background and ways students can get involved in addition to our clubs and events. So, Dezire, I'm coming back to you. So if listeners want to learn more about the Boehly Center, where do they go?

Dezire Morris

If they are on campus, they can come to us in Miller Hall suite 2002. When you come into Miller Hall, take the right stairs to the second floor, turn right, a keep following down the hallway all the way to the end, and we'll be on your left. If your virtual our website has a lot of information, head to boehlycenter dot mason dot wm dot edu, that is B-O-E-H-L-Y center dot mason dot wm dot edu. We will also be offering tabling in Miller Hall and hopefully in the Sadler Center. So if you see us, stop by and say hello. We hope you will consider coming to our kickoff event in September and Dog to Wall in September, as well as they are both great events. To learn more about us in the industry of financial services.

Morgan Hutter

Well, it's clear there is a busy fall ahead. And in addition to the Boehly Center programs, keep an eye out for Cohen Career Center career fairs, Meet the Firms, Tech Day, and a variety of company information sessions that'll be taking place throughout September. Just a reminder that the recruiting season happens very quickly in the fall, so jobs are already posted. Many of those positions are rolling applications. So if you had listened to our career podcasts with Noha at IHS Market, she talked about how early some of those jobs posted. So if you haven't listen over to that one, make sure you're keeping an eye out. The Boehly Center sends emails in the

fall every Tuesday and Thursday with employer-related information and events and every Wednesday with Boehly Center events and program information. So if you don't receive those emails and want to just reach out to us, we're happy to add you to those listserves. I want to take a chance to welcome Dannita and Dezire to the Tribe and thank them for joining us today on the Careers in Finance podcast at the Raymond A. Mason School of Business at William & Mary. Thanks again, Dannita and Dezire.

Dezire Morris

Thank you for having us.

Dannita Trice

It's a pleasure.

Morgan Hutter

Great. Well, thank you to our listeners, and we look forward to hearing you next time.

Jeffrey Rich

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