

Raymond A. Mason  
School of Business  
at William & Mary

# WOMEN'S STOCK PITCH



# & LEADERSHIP SUMMIT

March 25th, 2022  
[mason.wm.edu/wsp](https://mason.wm.edu/wsp)

The Women's Stock Pitch & Leadership Summit is an inclusive event in compliance with William & Mary's commitment to diversity and inclusion. To find out more please visit:  
[https://www.wm.edu/offices/compliance/discrimination\\_overview/nondiscrimination/index.php](https://www.wm.edu/offices/compliance/discrimination_overview/nondiscrimination/index.php)

# SCHEDULE

Friday, March 25th, 2022

**11:00 AM**

Judges Registration

Miller Hall and virtual.

**12:00 PM**

Stock Pitch Preliminary Round

Virtual presentations from teams & judges. Judges in person at Miller Hall or virtual.

**2:30 PM**

Team Feedback -

Final Round Teams and Judges Prep

Virtual feedback and final round teams prepare. Final round judges prepare in person.

**3:30 PM**

Final Round Stock Pitches

Judges and audience in Brinkley Commons, Miller Hall. Teams present virtually.

**5:15 PM**

Keynote: *The Rise to the Top: Power in Preparation*

Samira Imamverdiyeva, MBA '01

Director, Corporate Accounting Policy at Citigroup

**6:00 PM**

Networking Reception and Dinner

For W&M students, professionals, coaches & judges at the Williamsburg Lodge.

# Leaders,

We would like to extend a warm and enthusiastic thank you for attending the seventh annual Women's Stock Pitch & Leadership Summit.

The expertise of our partners, alumni, and planning team ensured this two-day event would be impactful and enriching. We encourage you to participate fully, engage with others, and support all of our teams competing today. Pivoting and adapting in the face of challenges are the skills we all have honed in the last two years. We are excited to present a two-day hybrid event, providing a space to cultivate meaningful connections and embrace our community of current and future leaders in business.

This year's Summit would not have been possible without the generous support of dozens of exceptional individuals and organizations. A special thanks goes out to our Gold partner (EY), Silver partner (Capital Group), Bronze partners (Fidelity Investments, BlackRock, RBC Capital Markets, UBS, Scotiabank, and Wells Fargo), and supporters (CAPTRUST, MUFG, 100 Women in Finance, Momentum Advisors, and Citadel).

We would also like to express our deep appreciation to our advisory council for their valuable guidance and support: Cindy Davis, Alice Davison, John Leone, Lisa Petrelli, Lisa Roday, and Matthew Siano, ESQ. An additional thank you goes to the officers of our Women in Business and Smart Woman Securities chapters for their instrumental role in the planning and execution of this year's Summit. The planning committee worked tirelessly behind-the-scenes and collaborated with professionals, faculty, staff, and students to produce an educational, inspiring, and empowering event. It is only with the commitment and dedication of all involved that we are able to do so.

Our community is one of inclusion, and we happily present a program for the WSP&LS 2022 that meets our students and professionals where they are and is respectful of others' needs. While some of you will be back in Miller Hall with us, others will be joining us remotely. Our event schedule, including remote, hybrid, and in-person programming, strives to connect all participants in a joined experience for the Women's Stock Pitch & Leadership Summit. Thank you for your unique contribution to this community of learning; we appreciate you!

Sincerely,

Morgan Hutter '06  
Interim Executive Director  
Boehly Center for Excellence in Finance

Shaina Green  
Alumni Engagement Coordinator  
Undergraduate & 1-Year Masters Programs

Lindsey Whittaker '21  
Post-Baccalaureate Fellow  
Boehly Center for Excellence in Finance



# 2022 Corporate Partners

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## GOLD



## SILVER



## BRONZE



Capital  
Markets



## SUPPORTERS



# About The Boehly Center

The Boehly Center for Excellence in Finance was established in January 2014 through a generous multi-year gift from alumni Todd & Katie Boehly. Benefiting from an exceptionally talented and motivated student body, the Boehly Center is training the next generation of leaders in finance.

The Center provides opportunities for advanced financial training, career exploration, networking, and experiential learning through financial firm-sponsored competitions and courses taught by industry leaders. The Center also offers leadership opportunities for members in our four student run clubs: the Howard J. Busbee Finance Academy, the Mason Investment Club, the Women in Business Club, and the Smart Woman Securities Chapter.

## Our Comparative Advantage

Through students' close interaction with faculty and other students, the Boehly Center capitalizes on William & Mary's ideal size and offers programs to students across campus, not only Finance majors. These opportunities allow students of all backgrounds to utilize W&M's rich alumni network in the financial services industry. Our graduates are currently working in finance at top firms including: EY, BlackRock, Fidelity Investments, MUFG, Goldman Sachs, Google, RBC Capital Markets, IBM, Capital Group, JP Morgan, Morgan Stanley, Capital One, Perella Weinberg Partners, PwC, UBS, and Wells Fargo.

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## TODD BOEHLY '96

CHAIRMAN & CHIEF EXECUTIVE  
OFFICER, ELDRIDGE INDUSTRIES

Todd is the Co-Founder, Chairman, and Chief Executive Officer of Eldridge, which manages a network of businesses across finance, technology, real estate, and entertainment. Prior to founding Eldridge in 2015, he was the President of Guggenheim Partners. Mr. Boehly is an owner of the Los Angeles Dodgers, the Los Angeles Lakers, the Los Angeles Sparks, Cloud9, and Draftkings. He is Chairman of Security Benefit, a leader in the U.S. retirement savings market, and MRC, which owns dick clark productions, and has investments in A24, Fulwell 73, and Penske Media, which owns Billboard, Rolling Stone, Variety, and The Hollywood Reporter. He is also on the boards of the Los Angeles Lakers, Flexjet, PayActiv, CAIS, Cain International, Kennedy Wilson (NYSE: KW), Vivid Seats (NASDAQ: SEAT), and Horizon Acquisition Corporation II (NYSE: HZON). Mr. Boehly was formerly on the board of Truebill.

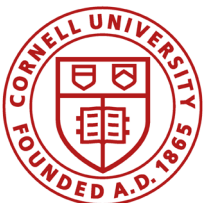


He received his BBA from William & Mary and studied at the London School of Economics. His wife, Katie Garrett Boehly, received a BA in History from William & Mary in 1995. Involved in various philanthropic efforts, he and his wife support epilepsy research, Focused Ultrasound Foundation, the Prostate Cancer Foundation, and Brunswick School.

# ABOUT THE STOCK PITCH COMPETITION

The Stock Pitch Competition brings together outstanding students from top universities (below). Representatives from leading financial firms judge the competition and are eager to engage with some of the brightest young students in the world.

The goal of the competition is to inspire students from a variety of backgrounds to pursue careers in finance. We seek to encourage diversity in all forms, recognizing that people with diverse identities, backgrounds, and experiences think and solve problems in creative ways. Such efforts are proven to provide businesses with a distinct competitive advantage. The William & Mary chapter of Smart Woman Securities (SWS) invites stock pitch teams from top-ranked universities around the world to participate in the competition. Through researching and presenting an investment opportunity with a long-term horizon, teams gain invaluable exposure and real-world experience.



# KEYNOTE SPEAKER

## SAMIRA IMAMVERDIYEVA, MBA '01

Samira Imamverdiyeva is a Director in the Corporate Accounting Policy team at Citigroup, based in New York. Samira has extensive experience serving SEC registrants and understands the challenges implementing accounting and reporting requirements under US GAAP and IFRS.

Prior to joining Citi, she worked as the Mergers & Acquisitions Controller for American Express for three years with a focus on acquisitions and divestitures related accounting matters and application of ASC 805 Business Combinations.

Prior to Amex, Samira served over ten years in transaction advisory services at PwC Capital Markets and Accounting Advisory Group in New York. She advised audit teams and non-audit clients on complex technical accounting topics such as consolidation, leases, stock-based comp, preparation of SEC compliant footnotes, MD&A and related disclosure requirements, filings of IPO registration statements from S-1, and S-X Article 11 proforma financial statements.

Samira holds a master's degree in business administration in finance from the William & Mary Raymond A. Mason School of Business. She is a Certified Public Accountant (CPA) and is a member of ACCA (Association of Certified Chartered Accountants). Samira completed the 2018 and 2019 New York Marathons, raising funds for the Team For Kids charity for use in providing physical education and sports to kids in the Greater New York area.

Samira's keynote is titled: *The Rise to the Top: Power in Preparation.*



*Director  
Corporate Accounting Policy  
at Citigroup*



Women's Stock Pitch  
& Leadership Summit

# ADVISORY COUNCIL

2022



CINDY DAVIS '80  
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JOHN LEONE '91  
Managing Director,  
Head of Quantitative Strategies,  
Wells Fargo Prime Services



LISA PETRELLI  
Managing Director, Acting Country Head  
and Head of Global Markets, Canada, UBS



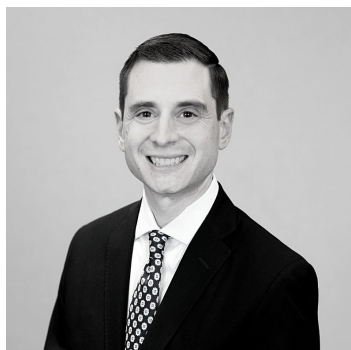
LISA RODAY P'14  
President and Chief  
Executive Officer,  
Firelce Solutions, LLC



MATTHEW B. SIANO, ESQ. '06  
Managing Director and General Counsel,  
Two Sigma Investments, LP



# PROFESSIONALS



## DAN BARONE

DIRECTOR, HEAD OF US SECURITIES LENDING, SCOTIABANK

Dan Barone helped launch Scotiabank's US Prime Services business in 2006 and has been head of the Securities Lending desk since 2014. He currently runs a seven person team covering North American markets. Dan has been instrumental in the development of co-op, internship, and rotational programs at Scotia over the last 10 years. He has acted as a manager, coach, mentor, and member of the recruiting steering committee that oversees entry-level hiring initiatives. Dan holds a bachelor's degree in finance with an Honors concentration from Villanova University School of Business.



## MELISSA BATISTA

ASSOCIATE DIRECTOR, SECURITIES LENDING, SCOTIABANK

Melissa Batista is an Associate Director on the Securities Lending team at Scotiabank in New York City. She has over ten years of experience in the securities lending and prime brokerage industry. She earned a bachelor's degree in international business from Northeastern University, with a concentration in finance.



## JESSICA K. BURT

MANAGING DIRECTOR, BLACKROCK

Jessica K. Burt, Managing Director, is responsible for the global platform and business strategy for BlackRock Investment Stewardship (BIS), overseeing daily operations and strategic initiatives for BIS. Jessica also heads the Voting Platform enabling institutional clients to vote their shares. Previously, she was the Global COO and lead business strategist of Fixed Income and Sustainable ETFs within the ETF and Index Investments business. During her tenure, she led strategic initiatives to grow the adjacent marketplace to Fixed Income ETFs. Just prior to her time in the ETF and Index Investment business, Jessica was the Global COO of the Trading and Liquidity

Strategies team as well as the Investment Platform unit. Her work spanned across trading, securities lending, cash and cross-platform strategic initiatives within the Investment Platform umbrella. She was a member of BlackRock's Platform and Innovation team responsible for the Americas Corporate and Risk practice area. She specifically focused on re-shaping, leading, and implementing regulatory change across the firm (i.e. Money Market Fund Reform, the Volcker legislation, and Central Clearing of derivatives under Title VII of the Dodd Frank Act). Jessica earned a bachelor's degree in business administration in finance from William & Mary with a minor in government.

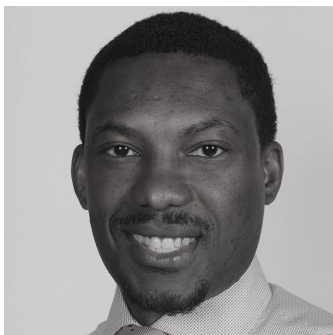


## WHITNEY CRAWFORD

EQUITY ANALYST, POLEN CAPITAL

Whitney Crawford is an Analyst at Polen Capital Management where she focuses on small cap growth investing. She has over 12 years' experience as an equity analyst. Prior to joining Polen Capital, Whitney was a Senior Analyst at Manulife Asset Management in Boston, where she worked for four years and specialized in Healthcare investing. Before Manulife, she was an Analyst at Fidelity Investments focusing primarily on small cap companies. Whitney received a bachelor's degree in economics from William & Mary, where she graduated *magna cum laude* in 2007. She received her master's

degree in business administration from Duke University Fuqua School of Business in 2013. Whitney is PRI certified in ESG investing and is also an advisor to the Integrated Refugee and Immigration Services (IRIS) endowment.



## ETIM EDIM

EXECUTIVE DIRECTOR, GLOBAL CFO,  
TECHNOLOGY, OPERATIONS, & RESILIENCE DIVISIONS, MORGAN STANLEY

Etim Edim is an Executive Director, Global CFO of the Technology, Operations, and Firm Resilience Divisions within Morgan Stanley, where he is responsible for Financial Planning and control of those divisions' combined ~\$6B cost base and ~\$5B balance sheet. Prior to joining Morgan Stanley four years ago, Etim served as a Senior Vice President at Credit Suisse where he spent 8+ years in a number of roles, including Americas CFO and Expense manager for the Institutional Equities Division. Etim holds a master's degree in business administration in finance and strategy from University

of Maryland's Smith School of Business, where he serves on the MBA Advisory Council. His first role after receiving his master's was a three year stint at Deloitte Consulting where he worked as a Senior Consultant in the Technology and Operations Strategy group. He obtained his bachelor's degree in business administration from William & Mary, where he also serves on the Business Analytics Board of the Raymond A. Mason Business School. He has recently completed the highly regarded McKinsey Executive Leadership Program.



## FRAN ENGORON

INDEPENDENT CONSULTANT & EXECUTIVE COACH

Fran Engoron is an independent consultant and coach specializing in human capital and organizational analysis. She was a consulting Partner at PwC for over 25 years, where she was also the first female member of both the US and Global Leadership Teams of Price Waterhouse. Fran has served on several boards, including the Foundation Board of the Raymond A. Mason School of Business of William & Mary. She was also the inaugural Chair of the W&M Society of 1918, which supports and celebrates the women of W&M. Fran is currently a Managing Director of Golden

Seeds, a large angel investment networking supporting women entrepreneurs.



## MATTHEW FIORDALISO

EXECUTIVE DIRECTOR, FIXED INCOME PRICING DIVISION, IHS MARKIT

Prior to IHS Markit, Matthew Fiordaliso worked as a Structured Products trader at multiple buy and sell side institutions, including Wells Fargo and Ramius. As a senior leader, he has been involved in multiple alliance partnerships in the IHS Markit pricing, indices and loans businesses. He joined Markit in 2010 to build their mortgage pricing operations and managed the securitized products, loan pricing and municipal bonds pricing operations and created IHS Markit's CLO pricing franchise. Matthew graduated from the Raymond A. Mason School of Business with a master's degree in accounting and a bachelor's degree in finance, both from William & Mary.



## KELLY GRIER

US CHAIR AND MANAGING PARTNER, AMERICAS MANAGING PARTNER, EY

Kelly Grier is EY's US Chair and Managing Partner and Americas Managing Partner, leading more than 81,000 people in 31 countries, with annual revenue of \$21.2 billion. Kelly chairs the US Executive Committee and Americas Operating Executive and represents EY in regulatory relationships. Her leadership portfolio includes membership on EY's Global Executive and Global Practice Group. She serves as Executive Sponsor for EY's focus on diversity, equity and inclusiveness. During her 30-year tenure at EY, Kelly has had extensive experience working around the globe as a client service partner

and senior advisor on Fortune 500 Audit and Advisory clients. Kelly is now a senior advisory partner on several of EY's largest accounts. Kelly previously was Vice Chair, Central Regional Managing Partner, where she led 10,000 professionals across 15 states and 17 offices. Kelly also served as Americas Vice Chair, Talent, where she focused on creating an exceptional experience for all EY people in the Americas and served on the Global Talent Executive.



## LAUREN JACOBSON

MANAGING DIRECTOR, COLUMBIA INVESTMENT MANAGEMENT COMPANY

Lauren Jacobson is a Managing Director with Columbia Investment Management Company (Columbia University's \$13bn Endowment). She is Co-Head of Columbia's Marketable Asset Classes and a member of the Endowment's Portfolio Construction Committee. She spent most of the prior four years as a Managing Director and generalist investing across private and public asset classes. Prior to joining Columbia in 2017, Lauren spent eight years at the Rockefeller Foundation's \$5 billion endowment where she was a Director and member of three-person team focused on marketable assets.

Her primary responsibilities included managing Rockefeller's \$1 billion absolute return and illiquid distressed portfolios. Lauren also played an active role in annual asset allocation studies. Lauren began her career at Goldman Sachs as an Analyst on the convertible bond desk. Lauren graduated from William & Mary in 2007 with bachelor's degree in business administration in finance and was a member of the varsity track team. Lauren served as a member of the Investment Advisory Committee for the Navigators from 2011 to 2016.



## ED MCGANN

GLOBAL HEAD, FX PLATFORM SALES, BNY MELLON

Ed McGann has over 35 years of experience in the banking and securities industry. He is currently the Global Head of FX platform Sales at BNY Mellon. Ed earned his bachelor's degree in economics from William & Mary in 1982.



## GREG MELICH

Final Round Judge

SENIOR MANAGING DIRECTOR, EVERCORE ISI

Greg Melich is a Senior Managing Director at Evercore ISI, leading coverage of the Retailing/Broadlines & Hardlines names. He most recently led the multichannel retail business at MoffettNathanson. Prior to that, he was a Senior Managing Director at Evercore ISI, where clients voted him the No.1 Institutional Investor-ranked Broadline and Hardline Retail analyst for six consecutive years. Previously, Greg was at Morgan Stanley, where he was a

Managing Director and top-ranked consumer-related analyst in both Europe and North America. He is a CFA charterholder and earned his bachelor's degree in economics from William & Mary.



## MOLLY NISSMAN

VICE PRESIDENT AND PORTFOLIO MANAGER,  
UBS FINANCIAL SERVICES INC.

Molly Nissman is a Vice President and Portfolio Manager at UBS Financial Services Inc. in Norfolk, Virginia. A Financial Advisor for over 30 years, she delivers optimal financial outcomes for families and businesses, guiding them to long-term well-being. Molly works with clients and their attorneys and CPAs, to develop customized strategies and financial plans, which can help inform key life decisions. Molly's dedication and personal touch help build strong

relationships with multiple generations, bringing continuity to families' long-term objectives and values. Molly began her financial services career at Merrill Lynch in 1977. As a commodity futures trader, she designed and implemented risk management strategies for Fortune 500 companies and family owned businesses. She came to Paine Webber, now UBS Financial Services Inc., in 1997, where she continues to specialize in helping families achieve investment clarity and financial independence. Molly received a master's degree in business administration from William & Mary, and received a bachelor's degree, *cum laude*, from Sweet Briar College, majoring in government, with a minor in economics.





## LEILA PECK

VICE PRESIDENT, FINANCIAL ADVISOR, MORGAN STANLEY

Leila Mathur Peck has been a Financial Advisor with Morgan Stanley for over 25 years. She received her bachelor's degree in journalism from the University of Maryland, with a specialty in science and technical communication. The training she received provided a foundation for research, analysis, synthesizing and applying technical concepts to client's investment portfolios. She is responsible and accountable for managing over \$140 million as of March 1, 2022. Throughout her career, she has provided personal attention and caring

to the families with whom she works. More recently, Leila has been working with the children and grandchildren of her clients, guiding them through their own financial planning and designing their financial path towards the future.



## LISA PETRELLI

Final Round Judge

MANAGING DIRECTOR, ACTING COUNTRY HEAD AND HEAD OF GLOBAL MARKETS, CANADA, UBS

Lisa Petrelli bears all regulatory, operational and risk supervision and management for the IB in Canada and has oversight to UBS Canada Wealth Management and Asset Management divisions. Lisa is the Canada Country representative at the UBS Americas Country Risk and Operational Management Committee and UBS' Extended Americas Management Committee. Prior to UBS, Lisa has worked at Goldman Sachs, Credit Suisse and Morgan Stanley,

and has held roles across all public market platforms dedicated to global sales, trading and capital markets. She is a current Board Member for 100 Women in Finance, and is on the Advisory Board for the Raymond A. Mason School of Business at William & Mary. Lisa is a founding member of UBS' Women Of Investment Bank and is part of the IB's Diversity and Inclusion Council. Lisa is a past participant on the Governing Council at the University of Toronto (UTM) and a past Women in Capital Markets Board Member. Lisa earned her bachelor's degree from the University of Toronto, and a master's degree from Wilfrid Laurier University. Lisa is a CFA charterholder and Institute of Corporate Directors designate.



## MOLLY PIERONI

MANAGING DIRECTOR, VENTURE CAPITAL & PRIVATE EQUITY, MC2 INSTITUTE

Molly Pieroni is the Managing Director for MC2 Institute, Venture Capital & Private Equity. She graduated from William & Mary in 1990 with a bachelor's degree in business administration in finance. She also has been a board member at William & Mary's Raymond A. Mason School of Business since 2018, serving on the Governance Committee, Investment Committee, Diversity & Inclusion Task Force.



## JOHN RITTENHOUSE

VICE PRESIDENT, CITI

John Rittenhouse is a Vice President at Citi and a William & Mary graduate. John graduated with his bachelor's degree in business administration in accounting in 2014, followed by a master's degree in accounting in 2015, both from the Raymond A. Mason School of Business. His professional experience is in investment banking, and he was an active member of the swim team at W&M.



## MATTHEW B. SIANO, ESQ.

MANAGING DIRECTOR AND GENERAL COUNSEL,  
TWO SIGMA INVESTMENTS, LP

Matthew Siano is an alumnus of William & Mary, graduating in the class of '96 as a History and Government double major with a Religion minor. He also wrote an Honors Thesis for the Government Department. He received his Juris Doctor from Fordham University School of Law in 1999. After graduating from Fordham Law, Matt started his career at Seward & Kissel LLP as an associate in their Investment Management Group. In July 2004, he started at Two Sigma Investments LLC, a New York-based hedge fund, and became General Counsel in December 2008 and is responsible for the Firm's legal, compliance and government affairs functions.



## KIRSTEN TRAVERS-UYHAM

ASSOCIATE PROFESSOR & ACADEMIC DIRECTOR, GOIZUETA BUSINESS  
SCHOOL, EMORY UNIVERSITY

Kirsten Travers-UyHam is an Associate Professor in the Practice of Finance at Goizueta Business School and Academic Director of the Master of Analytical Finance program. Her teaching and research interests include investment strategies, asset allocation, derivatives and risk management. Dr. Travers-UyHam is also the founder and managing partner of River Cam Partners, a private investment and risk advisory firm. With deep prior experience in the investment banking and hedge fund industry, most recently as Managing Director in global risk at Bear Stearns and Co. in New York, NY and Houston, TX, Dr. Travers-UyHam has focused on developing and implementing practical models for global trading strategies, risk measurement, and hedging techniques.





## KEVIN TUNICK

VICE PRESIDENT AND MANAGING DIRECTOR, PRIVATE INVESTMENTS TEAM,  
UNC MANAGEMENT COMPANY

Kevin Tunick is the Vice President and Managing Director of the Private Investments team at the UNC Management Company. Prior to joining the UNC Management Company in 2008, he spent 17 years at the Harvard Management Company (HMC) in Boston, MA serving as a Manager on the private equity team and was responsible for co-managing a \$4.1 billion portfolio of alternative investment partnerships. Previously, Kevin worked at the Rockefeller Foundation in New York, NY where, as the Chief Investment Analyst, he managed an \$80 million short-term fixed income portfolio and a \$3 million equity portfolio. He also served as Manager of Partnership

Fund Accounting at Commodities Corporation USA in Princeton, NJ and as the controller at American Handling Equipment, Inc. Kevin graduated from William & Mary with a bachelor's degree in business administration and received a master's degree in business administration from Pennsylvania State University.



## MIKE VOGELZANG

MANAGING DIRECTOR, CHIEF INVESTMENT OFFICER, CAPTRUST

Mike Vogelzang serves as CAPTRUST's chief investment officer (CIO), and brings more than 30 years of portfolio management, market strategy, and investment research experience to the firm. As CAPTRUST's CIO, Mike oversees the Investment Group, which includes manager and security research, portfolio management, and a team of investment strategists. This group's investment capabilities are supported by more than 30 additional investment professionals across the firm's wealth and Institutional Solutions Groups, each of whom focuses on applying and customizing investment research and views

to meet the needs of various clients. Prior to joining the firm, Mike was president and chief investment officer of Boston Advisors. Before that, he held senior positions with Freedom Capital Management and Shawmut Investment Management. He began his investment career at The Boston Company.



## ERWIN VAN DER VOORT

Final Round Judge

MANAGING DIRECTOR AND HEAD OF GLOBAL PRIVATE CAPITAL GROUP  
RBC CAPITAL MARKETS

Erwin van der Voort is a Managing Director and the Head of the Global Private Capital Group, at RBC Capital Markets based in New York. He is responsible for all private capital transactions at RBC including coverage of investment holding companies, alternative asset managers, family offices and hedge fund clients, the marketing, structuring, execution and placement of Private Capital transactions and Special Purpose Acquisition Corporations (SPACs). Prior to joining RBC in October 2016, Erwin was with Credit Suisse, most recently leading the Hedge Fund Investment

Banking business, which he founded in 2011. From 1996 until 2010, Erwin was a member of the Mergers & Acquisitions group, responsible for marketing and executing M&A and strategic advisory assignments. From 2007 until 2010, Erwin led CS's M&A business in Continental Europe, Middle East and Africa based in London. Prior to moving to London, Erwin was a member of CS's M&A group in New York from 1998 to 2007, responsible for the M&A product in the Consumer Products and the Lodging & Leisure sectors. Erwin joined Credit Suisse in 1994 in Equity Capital Markets. During this period he was involved in initial public offerings and secondary equity offerings in a variety of different industries. Erwin earned a dual master's degree in economics from Erasmus University Rotterdam, the Netherlands.

Women's Stock Pitch  
& Leadership Summit

# PLANNING COMMITTEE

2022



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Director of  
Development,  
Undergraduate and 1-Year  
Masters Programs



BETSY EDWARDS  
Associate Director,  
Donor Relations and  
Special Events



AANCHAL GOENKA  
President, Smart  
Woman Securities



SHAINA GREEN  
Alumni Engagement  
Coordinator,  
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MORGAN HUTTER  
Interim  
Executive Director,  
Boehly Center for  
Excellence in Finance



MAEVE MARSH  
President, Women in  
Business



DEZIRE MORRIS  
Administrative Project  
Coordinator, Boehly  
Center for Excellence  
in Finance



JULIE PALMER  
Senior Director,  
Development & Alumni  
Engagement,  
Undergraduate & 1-Year  
Masters Programs



RACHEL SOUTHERN  
Assistant Director,  
Industry Advising:  
Business Careers



LINDSEY WHITTAKER  
Post-Baccalaureate  
Fellow, Boehly  
Center for Excellence  
in Finance

# NOTES

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# NOTES

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



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



Raymond A. Mason  
School of Business

WILLIAM & MARY

THE  
BOEHLY CENTER

FOR EXCELLENCE IN FINANCE

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