



## THE BOEHLY CENTER

FOR EXCELLENCE IN FINANCE



### Monthly Happenings April 2022

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#### Executive Director Scoop



*From left: Joey Smith, Morgan Hutter, Dannita Trice, Matt Hedrick, Dezire Morris*

The Boehly Center has been in full swing in 2022! We have launched several brand-new initiatives to include, but not limited to our Summer and Full-Time Job Hubs, an International Alumni & Student LinkedIn Group, Instagram, a brand new Club leadership position focused on DEI&B, a new 101 Guide to Consulting Hiring, a video archive of financial terms to help students prepare for interviews and we are in the process of creating a brand-new professional development and soft-skills program. While all of that was taking place, we also conducted the Women's Stock Pitch and Leadership Summit, Python, Training the Street, Financial Literacy Programs, Cornell Women in Investing team recruitment, and launched two new special topic courses – and it's only April!

This will be my final Executive Director update as I will be departing my alma mater at the end of this semester to pursue other endeavors. I have truly enjoyed serving the university, Mason School, Boehly Center and our incredible students and alumni. It has been an absolute honor to work at W&M for the past six years. I am excited to announce that Professor Joey Smith, a Clinical Assistant Professor of Finance and Economics at the Mason School will transition into the role during the summer. Joey has been the liaison for the Howard J. Busbee Finance Academy and a huge support to the Financial Literacy Program. We are meeting weekly to ensure a smooth transition. Other exciting news is Dannita Trice who has been with the Center for the past year will be promoted to the Director of Engagement & Operations to provide operational support and she will continue to be the primary contact for student-centered academic and industry-education coaching. This month we welcomed Matt Hedrick as the Assistant Director for Events & Programs and Matt will be responsible for managing and executing all programs, trainings and events (excluding WSP&LS). In more good news, Dezire Morris our Administrative Project Coordinator has been moved to a full-time role to provide additional program and event support. The Boehly Center is in great hands and the team is working incredibly hard to wrap up year two of our three-year strategic plan!

*Morgan Hutter, Interim Executive Director, Boehly Center*

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### Welcome Matt Hedrick

## Assistant Director of Events & Programs



Please join the Boehly Center in welcoming its newest team member, **Matthew Hedrick** '21, Assistant Director, Events & Programs. Matt comes to us from the Virginia Community College System, most recently Thomas Nelson Community College. He has over 5 years combined experience in administrative management, and events and programs coordination to include signature and high-profile higher education programs.

Matt will lead coordination of the Boehly Center's signature programs and events, including From DoG Street to Wall Street, Alumni Mentor Match Program, Financial Literacy Program, subject-matter training programs (Python, SQL, Training the Street, etc.) and more (excluding the Women's Stock Pitch & Leadership Summit).

The Boehly Center and the Raymond A. Mason School of Business as a whole are incredibly fortunate to have Matt's expertise and enthusiasm!

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# STUDENT SPOTLIGHT



*Top (from left): Sarah Carnell, Caroline Jiang, Shriya Kosuru  
Bottom (from left): Emma Mormile, Nandhini Nallamotu, Caroline Scheider-Williams*

With the 7th Annual Women's Stock Pitch & Leadership Summit now concluded, the Boehly Center recognizes the six amazing students who represented W&M in the competition: Sarah Carnell, Caroline Jiang & Shriya Kosuru (**W&M Green** sub-team) and Emma Mormile, Nandhini Nallamotu & Caroline Scheider-Williams (**W&M Gold** sub-team). Each worked tirelessly to prepare a captivating pitch along with their professional coaches, Executive Partners of the Raymond A. Mason School of Business, Robert (Bob) Mcknew and Thomas (Tom) Zeni!

The W&M team presented an astounding final stock pitch to the competition judges and attendees, ultimately coming in 4th place! Please join us in congratulating the W&M Team for their fantastic pitch and placement!

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## Thank You for Your Service Dr. Julie Agnew



The Boehly Center extends a HUGE thank you to Dr. Julie Agnew in recognition of her continued service and support of the Boehly Center for Excellence in Finance since 2004.

Thank you Professor Agnew for being instrumental in the founding & launching of the Boehly Center and signature programs and services that we still provide today. Dr. Agnew has played a formative role in the launching of multiple study abroad trips, our student-led clubs, special topic courses, the From DoG Street to Wall Street Conference, the Mentor Match Program, and more!

The Boehly Center would not be what it is today without Dr. Agnew's service and we invite you to share words of gratitude and/or your favorite memory with her!

[Leave a Thank You Note HERE](#)



## **7TH ANNUAL WOMEN'S STOCK PITCH & LEADERSHIP SUMMIT**

Have you ever attended our Women's Stock Pitch & Leadership Summit? If so, please help us! We are in the process of evaluating the event and seeing if we should adjust the event moving forward. Please take 5-7 minutes to complete this informational survey by Wednesday, April 20 by clicking:

[Feedback Survey](#)

Thank you for your assistance in making sure we provide the best programs & events possible for our students.

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## **Peer Mentorship Program Tribe Funding**





The Boehly Center for Excellence in Finance is raising money to support our Peer Mentorship Program, which pairs business upperclassmen with prospective first- and second-year business students, with a current priority of peer coffee chats. Consider donating to this effort during One Tribe, One Day or anytime before May 13.

A huge thank you from the Boehly Center Team!

[Click to Donate](#)

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## Financial Literacy Program Lunch Event



The Financial Literacy Program hosted a lunch event on April 1, presenting on a variety of

financial literacy topics to a packed room of inquiring students over lunch.

The Boehly Center Financial Literacy Program is a student-run, non-credit, certificate-granting program that seeks to provide students with a working knowledge of basic personal finance concepts in critical areas such as personal budgeting, student loans and personal credit, the economics of higher education, insurance and taxes, and saving and investment for retirement to all current W&M undergraduate students.

The program is currently accepting applications for Fall 2022 Peer Educator Leaders. Peer Educator Leaders learn about financial literacy and are able to be creative in teaching this information across campus and beyond.

Application review begins on a rolling basis today, Friday, April 15th for this paid position.

[Apply HERE](#)

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## Summer Intern & Full-Time Hubs



These hubs are intended to help W&M students connect and support one another as they intern and work in cities across the U.S. during the summer. While this program is targeted toward finance students, all W&M students are invited to join.

Suggested uses of the platform include: finding a roommate, transportation to/from work, meal meet-ups & coffees, weekend exploring, and networking.

Are you interning or working this summer and interested in connecting with other W&M students?

[Join a Hub Today](#)

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## **\*NEW\*** Financial Terms Video Library

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# Finance Decoded

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Preparing for an interview? Curious what finance terms mean?  
Check out the Boehly Center's brand-new video archive here:

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## Finance TA & RA Opportunities

The Boehly Center is now accepting applications for Teaching Assistant and/or Research Assistant positions to support finance faculty! This is a great way to hone leadership, administrative and perhaps presentation skills. Paid TAs and RAs typically receive \$11/hour and can work up to 10 hours/week. Applicants will be considered on a rolling basis as opportunities become available with faculty in Summer 2022, Fall 2022 and Spring 2023. Apply by Friday, June 3 for first consideration.

Apply [HERE](#)

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## International Finance Students & Alumni Linkedin Group

A dark blue banner for the International LinkedIn Group. At the top, the words "INTERNATIONAL LINKEDIN GROUP" are written in large, bold, white capital letters. Below this, on the left, is a yellow rectangular box with black text that reads: "Connecting W&M international students and alumni interested in financial services for career exploration and navigating recruitment." To the right of this box is a stylized globe showing the Americas in green against a blue background. Above the globe, the text "JOIN NOW: bit.ly/boehly\_international/" is written in a curved path. Below the yellow box, white text states: "While this group is targeted to international finance students and alumni, all W&M students and alumni are welcome to join." In the bottom left corner is the logo for the Raymond A. Mason School of Business, William & Mary. In the bottom right corner is the logo for The Boehly Center, with the tagline "FOR EXCELLENCE IN FINANCE" below it.

**INTERNATIONAL  
LINKEDIN GROUP**

Connecting W&M international students and alumni interested in financial services for career exploration and navigating recruitment.

While this group is targeted to international finance students and alumni, all W&M students and alumni are welcome to join.

JOIN NOW: [bit.ly/boehly\\_international/](https://bit.ly/boehly_international/)

 Raymond A. Mason  
School of Business  
WILLIAM & MARY

 THE  
BOEHLY CENTER  
FOR EXCELLENCE IN FINANCE

Click [HERE](#) to Join

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## Fremont Inspiring Futures in Finance Program Registration Open

Inspiring Futures in Finance Program (IFFP), hosted by employer Fremont Group, is a 6-week, 1-credit hour series of interactive professional development sessions created to expose students of diverse backgrounds to investing in fund-of-funds, venture capital, public and private equities, and real estate.

Learn more about Fremont Group [here](#).

Apply [HERE](#)

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## The Boehly Center is on Instagram!



Follow the official Boehly Center Instagram @BoehlyCTR for all things Boehly Center, including Center events, trainings, and other offerings! @BoehlyCTR will also operate as a hub for offerings from our student-led clubs & programs!

Follow Us Today @BoehlyCTR

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## Finance Specialty Courses for Fall 2022

Apply now to be considered for the finance specialty experiential courses listed. Apply today, as rolling application review and admittance decisions are underway.

**Distinguish Financial Management** - Led by Professor Katherine Guthrie, 3 credits, designed to prepare rising sophomores for advanced study in finance up to one year before the traditional curriculum path.

Distinguish Financial Management Application

**Student Managed Investment Fund (SMIF)** - Led by Professor Hugh Marble, 3-credit, provides students real-world portfolio management and security analysis experience.

Student Managed Investment Fund Application

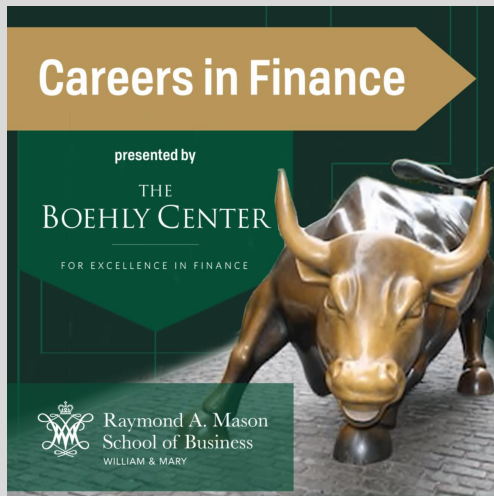
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## Looking Ahead in Spring 2022

Key events & programs to be held in spring semester!

**April 15:** 2021-2022 Incentive Program Concludes





New episodes now LIVE!  
Click episodes below to listen!

Economic Consulting

Personal Financial Planning & Financial Literacy

Mergers & Acquisitions



BOEHLY CENTER WEEKLY EMAIL:

**INTERSHIPS,  
FULL-TIME  
POSITIONS, &  
WEBINARS**

Each Thursday, the Boehly Center provides updated internship/job opportunities, professional development webinars, and networking events.

Want to receive this email?  
**CLICK HERE!**



Know someone who wants to receive the Boehly Center Newsletter as well as other communications?

Have them sign-up [HERE](#)

**Know of Job or Internship Opportunities?**

Contact [Boehly.Center@mason.wm.edu](mailto:Boehly.Center@mason.wm.edu)

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## WANT TO SUPPORT THE BOEHLY CENTER?

Consider donating today!

THANK



YOU



If you would 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](#).

Visit our Website



BOEHLY.CENTER@MASON.WM.EDU

## THE BOEHLY CENTER

FOR EXCELLENCE IN FINANCE

The Boehly Center and its events, programs and clubs are open to any student interested in financial services and the Boehly Center does not discriminate on basis of race, national origin, color, sex, gender, sexual orientation, disability or age. To find out more [click here](#).