

Raymond A. Mason  
School of Business  
William & Mary

# WOMEN'S STOCK PITCH



# & LEADERSHIP SUMMIT

March 31 - April 1, 2023  
[mason.wm.edu/wsp](https://mason.wm.edu/wsp)

# SUPPORT



We invite you to become a corporate partner of a student-led conference that brings together scholars from prestigious universities along with exceptional women from the private sector. Our goals are to execute an outstanding stock pitch competition, develop leadership skills, impart knowledge and expertise in portfolio management and equity analysis to all students, including a historically under-represented demographic in financial services: women.



# CORPORATE PARTNER INFORMATION

Stock pitch events across the country are dominated by homogeneous teams thereby impeding a diverse perspective. With gender diversity is conveyed cognitive diversity. And, cognitive diversity provides businesses a distinct competitive advantage. That is why a stock pitch including women is so important.

The goal of the competition, now in its eighth year, is to expose students from varied backgrounds to careers in finance.

Professional attendees are drawn from across the William & Mary alumni population and from among our partnering organizations in the belief that engagement between professional investors, faculty, and students will deliver an outcome that is enormously impactful for all who participate.

Partnership eliminates several barriers to participation for students from across the country, thus, enabling the conference through budget empowerment. In addition to membership in a remarkable community focused on helping women, partners also receive the resumes of all participating students. Attending partner representatives have the opportunity to meet and network with students during the event. Based on need, availability

and compatibility, partners may serve as judges, panelists, or student coaches.

For more information on the conference, including testimonials from students and professionals from previous years, please visit [mason.wm.edu/wsp](https://mason.wm.edu/wsp) or contact:

Anthony Ball  
[anthony.ball@wmbsf.org](mailto:anthony.ball@wmbsf.org)

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)

# PARTNERSHIP PACKAGES

## Platinum: \$20,000+

- Recognition of Platinum Partnership on all signage, marketing materials, and quarter page message in conference booklet
- May assign one professional to the Women's Stock Pitch & Leadership Summit Advisory Council
- May send up to two professionals to judge applications for admission to the Women's Stock Pitch & Leadership Summit
- May send a professional to coach a competing team prior to the Women's Stock Pitch & Leadership Summit
- Participation in career exploration session
- Access to resume book of participating students
- Access to Networking Hour on Friday of the event
- Attend all onsite events on Saturday

## Gold: \$10,000+

- Recognition of Gold Partnership on all signage, marketing materials, and quarter page message in conference booklet
- May send up one professional to judge applications for admission to the Women's Stock Pitch & Leadership Summit
- May send a professional to coach a competing team prior to the Women's Stock Pitch & Leadership Summit
- Participation in career exploration session
- Access to resume book of participating students
- Access to Networking Hour on Friday of the event
- Attend all onsite events on Saturday

## Silver: \$7,500+

- Recognition of Silver Partnership on all signage, marketing materials, and quarter page message in conference booklet
- May send one professional to coach a competing team prior to the Women's Stock Pitch & Leadership Summit
- Participation in career exploration session
- Access to resume book of participating students
- Access to Networking Hour on Friday of the event
- Attend all onsite events on Saturday

## Bronze: \$5,000+

- Recognition of Bronze Partnership on all signage, marketing materials, and quarter page message in conference booklet
- Participation in career exploration session
- Access to resume book of participating students
- Access to Networking Hour on Friday of the event
- Attend all onsite events on Saturday

## Supporter: \$2,000+

- Recognition of support on all signage, marketing materials, and quarter page message in conference booklet
- Access to resume book of participating students
- Access to Career Exploration Session on Friday of the event
- Access to Networking Hour on Friday of the event
- Attend all onsite events on Saturday

## 2022 Corporate Partners:

### Gold Partners



### Silver Partners



### Bronze Partners

BlackRock



Capital  
Markets



### Supporters



CAPTRUST



MUFG



Momentum  
Partnership  
Advisors

Advisors



<b>Alexander Blaha</b> Senior Strategy Associate, Eldridge Industries	<b>Ann Benjamin</b> Former Managing Director and Chief Investment Officer, Neuberger Berman	<b>Cindy Davis</b> Board Member, William & Mary Foundation
<b>Becca Gildea</b> Senior Manager, Financial Services Consulting, EY	<b>Lauren Jacobson</b> Chief Investment Officer, Hamilton College	<b>John Leone</b> Managing Director, Head of Quantitative Strategy, Wells Fargo
<b>Lauren Malafronte</b> Managing Director, Scotiabank	<b>Lisa Petrelli</b> Managing Director, Country Head and Head of Global Markets, Canada - UBS	<b>Lindsey Whittaker</b> Fixed Income Research Associate, Fidelity Investments Former Women's Stock Pitch Fellow at W&M

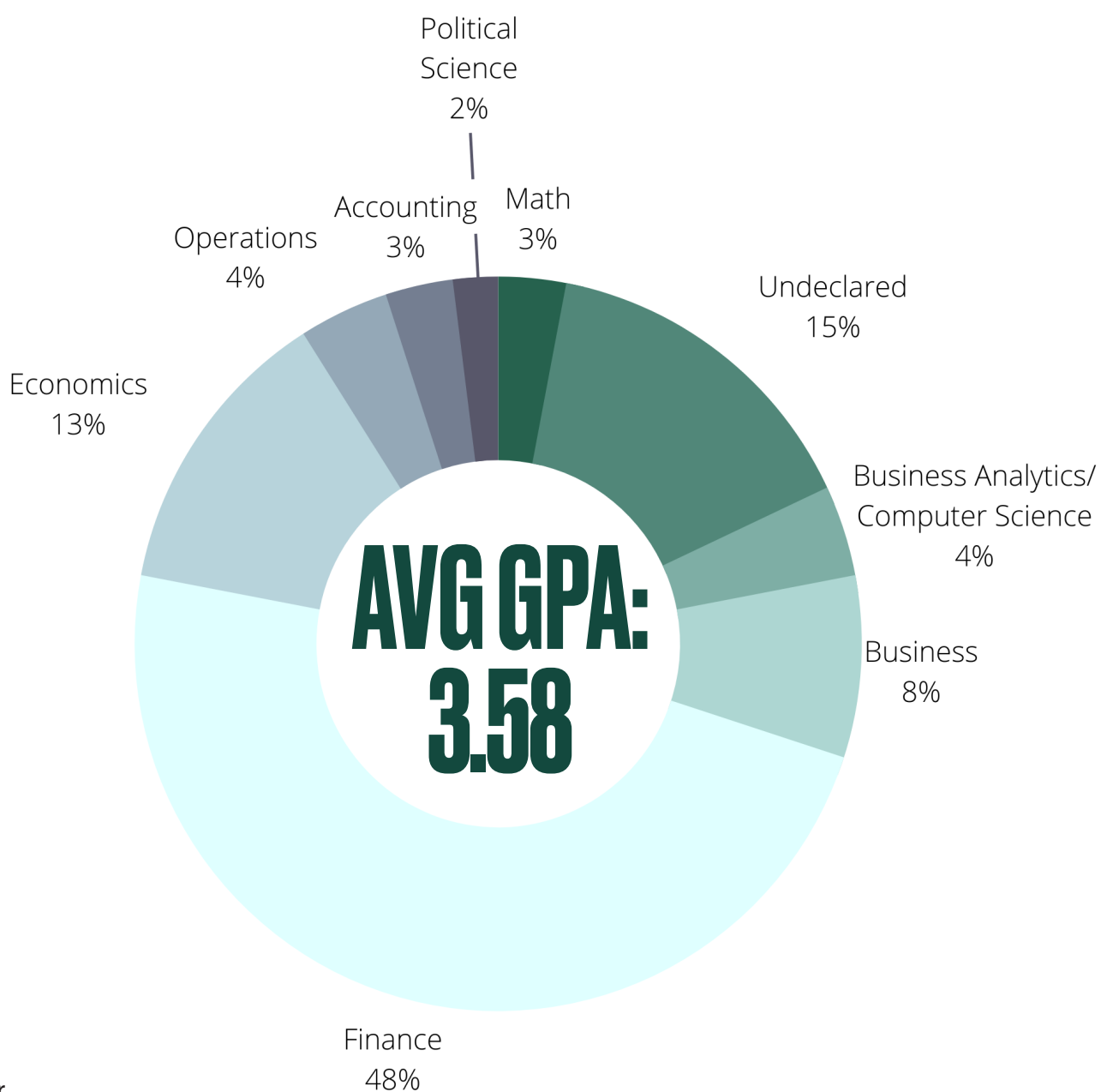
# ADVISORY COUNCIL



# UNIVERSITIES

Alabama	Fordham	NYU
UC Berkeley	Georgia Tech	UPenn
Boston College	Griffith	UPitt
Brown	Hebrew	Stanford
BYU	Howard	St. John's University
Carleton	Indiana	USydney
Carnegie Mellon	UMass Amherst	UT Austin
Chicago	Michigan	Utah State
Columbia	Morgan State	UVA
UConn	Memorial University	Wake Forest
Cornell	North Western	West Point
Durham	Notre Dame	William & Mary

# 2022



## The Boehly Center For Excellence in Finance

The Women's Stock Pitch & Leadership Summit is a signature event of the Center. Established through the generosity of Todd and Katie Boehly, the Center provides opportunities for advanced financial training, career exploration, networking and experiential learning for students of diverse backgrounds whose interests are in pursuing careers in the finance industry.

# STUDENT DATA

Students from W&M apply to participate alongside 70 students from top-ranked universities competing in the stock pitch.

The Stock Pitch is organized by Smart Woman Securities (SWS), a not-for-profit organization focused on educating young women about investing in the financial markets. Their mission is to endow every woman with the proper skills and training to successfully invest on her own.

Summit programming is created by Women in Business (WIB), which is dedicated to promoting the success of women in all business

environments. Their mission is to help change the misconceptions and limitations of a woman's position in the workplace by eliminating inequality and providing its members with the knowledge and confidence to relentlessly chase their ambitions.



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FOR EXCELLENCE IN FINANCE