



THE BOEHLY CENTER

FOR EXCELLENCE IN FINANCE



Monthly Happenings February 2023



STUDENT SPOTLIGHT



Name: Daniela Pereira Flores

Major: Business Analytics (Data Science),
Organizational Behavior and Management
Concentration

Graduating Class: 2024

Current Internship/Upcoming: Legal Business
Solutions Intern at PWC (Washington DC)

How has the Boehly Center impacted you?:
The Boehly Center has played a major role in my
academic, professional, and even personal life. I
have been able to meet amazing people who are not

only kind and helpful but are people who truly care about me, my interests, and my success. Every event, opportunity, and program that I have been able to attend through the Boehly Center has allowed me to grow tremendously, and I could not be more grateful to the staff and all the resources that they provide us. Having a place like the Boehly Center truly makes a difference for all of us, especially during stressful moments such as prepping and recruiting, so I am thankful for all the support, motivation, and encouragement.

Welcome 2023 Boehly Center Post-Baccalaureate Fellows



The Boehly Center welcomes its 2023 Post-Baccalaureate Fellows! These are December graduates who work for the Center each spring. We have hired three (3) Fellows: Julia Laurilliard, Joshua Link, and Meredith Webb. They will be supporting the Women's Stock Pitch & Leadership Summit, Data Feast Case Competition, Charlotte Trek, Incentive Program, professional development resources, and more!

Please join us in welcoming Julia, Joshua, and Meredith!

Boehly Center Hosts Spring Open House



On February 2, the Boehly Center held its Open House for Spring 2023! Attendees stopped by our various Club & Partner tables to learn more about finance-related and professional development opportunities! Forty-nine (49) students received a presentation on Boehly Center & partner events, programs, trainings, and more.

Following, students stopped by our two (2) partner tables, including the Office of Career Development & Professional Engagement and the Undergraduate Business Office, and five (5) student-led club and program tables. Students also had the opportunity to stop by the Women's Stock Pitch & Leadership Summit to learn more and apply for the upcoming event!

A special thanks to our partners, student leaders, and fellows for joining us in connecting students with an array of professional development offerings!

Howard J. Busbee Finance Academy and Smart Woman Securities Host MUFG



On Tuesday, February 7, the Howard J. Busbee Finance Academy and Smart Woman Securities partnered with MUFG to host a semi-virtual recruitment event! Thirty-five (35) students gathered in Miller Hall to learn more about one of the largest investment banks in the world, who attended virtually.

Students, prepared with questions, received a presentation on project finance, ESG investing as well as background on MUFG, its recruitment process, and summer internship opportunities.

2023 Women's Stock Pitch & Leadership Summit - March 31 & April 1

Apply by February 17 for first consideration!

W WOMEN'S STOCK PITCH & LEADERSHIP SUMMIT 2023

MARCH 31

3:30 PM Career Exploration Sessions
4:30 PM Recruiting Conversations & Networking
5:30 PM Dinner at Alumni House
6:30 PM Keynote Address

& APRIL 1

11:00 AM Panel with Deborah Tannen
11:45 PM Mentoring & Coaching Lunch & Keynote
1:00 PM Second Panel Discussion
2:00 PM Final Stock Pitches
3:40 PM Faculty Remarks

LEADERSHIP DEVELOPMENT

A must-attend event for students eager to develop an edge in the financial services industry. The 7th William & Mary Women's Stock Pitch & Leadership Summit by the Raymond A. Mason School of Business at William & Mary will be held on-campus, and students are invited to apply for the Leadership Summit portion of the event. Expect keynote speakers, career exploration sessions, alumni networking dinner, observe stock pitch finalists, and more.

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Raymond A. Mason
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WILLIAM & MARY
OFFICE OF CAREER DEVELOPMENT
& PROFESSIONAL ENGAGEMENT



KATY NEUMER
MANAGING DIRECTOR
J. Wood Capital Advisors



DEBORAH TANNEN
AUTHOR & PROFESSOR
Georgetown University



MICHELLE AVERY
SENIOR
MANAGING DIRECTOR
J.S. Held LLC

SPEAKERS

A mandatory preparation event will be held at
5:30 PM Friday, February 24th.



Student Registration

*If you have a conflict on Friday, February 24, please include the reasoning for your conflict within the form to get special permission to not participate in the pre-sessions.

Charlotte Trek - Apply by February 25

CHARLOTTE TREK

May 21-24th, 2023

The Boehly Center is hosting its very first Charlotte Trek, where students can engage with employers via employer site visits.



Kick-off the summer in one of the fastest growing big cities in the U.S. (Forbes 2019), Charlotte, North Carolina. The Charlotte Trek will be a three-day experience held **Sunday, May 21 - Wednesday, May 24, 2023** in the heart of the city. Students will travel to the area to visit various employer sites and to meet with W&M alumni employed in various business industries (financial services, media and marketing, etc.), to include a student-alumni dinner.

Depending on interest, bus transportation may be provided from W&M to the Charlotte area. Overnight hotel stays at the Hilton Charlotte Uptown with a roommate will be provided.

Students are to submit a \$100 fee to attend. First-year and sophomore students will be given preference; any W&M student is welcome to apply. **Apply by Saturday, February 25** at the link below.

[Application Form](#)

Intro to Python Workshop

Apply by March 24



Apply now for a chance to receive hands-on Python software training during the in-person workshop held Friday, April 7, 9 AM - 5 PM (includes one hour lunch break). Application review and admission decisions will be made on a rolling basis beginning **Monday, March 27th**. Complete the short form below to apply!

[Application Form](#)

Upcoming Information Sessions



ELDRIDGE

Eldridge Industries

Eldridge, co-owned by Todd Boehly, will be on campus promoting their jobs in TribeCareers and hosting an Information Session. Join the Eldridge team to learn more about the team and opportunities at the firm.

Information Session Details: **Thursday, February 23 from 5 - 6 PM** at the **Presentation Room at the Cohen Career Center**. RSVP in TribeCareers.

RSVP in TribeCareers

J.P.Morgan

Join William & Mary alumni Arjun Kaul and Jarrett Walker for a series of events happening February 24th and 25th! On **February 24th at 3:30pm in Miller 1088**, Arjun and Jarrett will host an Investment Banking Q&A to answer any questions students may have about the IB landscape, J.P. Morgan's recruiting process, or the Summer 2024 internship.

Information Session Registration

On **February 25th at 11am in Miller 1066**, Arjun will be giving a guest lecture entitled "Financial Modeling Workshop for M&A" where he will present how he goes about financial modeling in excel. Bring your laptop to follow along!

Financial Modeling Workshop Registration

Lastly, J.P. Morgan will be collecting resumes for their Summer 2024 Corporate & Investment Banking Summer Analyst Program. You can view the details on TribeCareers [here](#).

Finance Specialty Courses for Fall 2023

Apply Today!

We are thrilled to now accept applications for the following course for Fall 2023:

- **Distinguish Financial Management (Fall 2023)** - Professor Katherine Guthrie will facilitate the course. This is a 3-credit course designed to prepare rising sophomores for advanced study in finance up to one year before the traditional curriculum path.

Financial Management Application

- **Distinguish Student Managed Investment Fund (Fall 2023)** - Professor Hugh Marble will facilitate the course. This is a 3-credit experiential course that provides students real-world portfolio management and security analysis experience.

Student Managed Investment Fund

A Look Ahead

Save the following dates for key events & programs

February 17: Cohen Career Center Internship & Career Fair

February 17: Cohen Career Center Diversity Expo

February 24: Preparation Event for WSP

March 3 - 4: Training the Street (in-person)

March 31 - April 1: Women's Stock Pitch & Leadership Summit

April 7: Python Training with Cognitir (in-person)

May 21 - May 24: Charlotte Trek (to be rescheduled)

Careers in Finance

presented by

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Raymond A. Mason
School of Business
WILLIAM & MARY



Click episodes below to listen!

Personal Financial Planning &
Financial Literacy



BOEHLY CENTER WEEKLY EMAIL:

**INTERNSHIPS,
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 Monthly Happenings newsletter?

Have them sign-up [HERE](#)

Know of Job or Internship Opportunities?

Contact Boehly.Center@mason.wm.edu

**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



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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](#).