



THE  
BOEHLY CENTER

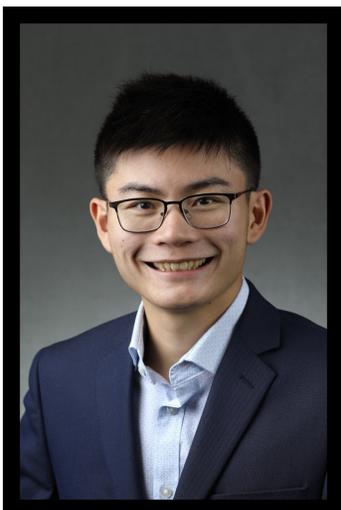
FOR EXCELLENCE IN FINANCE



## Monthly Happenings October 2023



# STUDENT SPOTLIGHT



**Name:** Charles Tai

**Major:** Finance **Minor:** Economics

**Graduating Class:** 2024

**Recent Internship:** JPMorgan's Middle Market Banking Summer Analyst Program

### **How has the Boehly Center impacted you?**

The Boehly Center has been instrumental to my professional development and journey as a student at William & Mary. I've pitched at Mason Investment Club, met successful finance alumni at DoG 2 Wall Street and Wall Street Program, and learned from Student Managed Investment Fund and Training the Street. As the current coordinator of the Financial Literacy Program, I have had such a rewarding

experience presenting valuable personal finance topics to the campus community at-large. Much of my passion for finance would not be possible without the support of the Boehly Center!

## The Boehly Center Welcomes New & Returning Students with Welcome Event

The Boehly Center and the Undergraduate Business Office hosted a Welcome Event in the Miller Hall Atrium.

All undergraduate students with any interest in business and also current business majors, regardless of class year, were invited to attend. Over 200 students enjoyed pizza, snow cones, games, and more. Business school faculty, staff, clubs, and more were present to connect with the students.

Students stopped by the various tables hosted by student-led clubs and departments, introducing worthwhile professional development opportunities.



Departments included: The Entrepreneurship Hub, Office of Career Development & Professional Engagement, MSBA/MAcc/MBA programs, the Boehly Center, Undergraduate Business Office, and the Reves Center.

Clubs included: Howard J. Busbee Finance Academy, Mason Investment Club, Smart Woman Securities, Women in Business, Gibbs Accounting Society, Peer Mentorship Program, Financial Literacy Program, Tribe Innovation, and Student Marketing Association.

A special thanks to all who attended! We greatly enjoyed connecting with you all and we look forward to supporting you in your professional endeavors!

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## The Boehly Center Hosts Training the Street Workshops



The Boehly Center hosted a successful Training the Street session, which are 8-hour intensive trainings on corporate valuation and financial modeling, held at the top of the semester.

The Undergraduate session was held over Labor Day weekend, on September 1 and 2,

and welcomed approximately 40 students during the course. The MBA session was held virtually for 36 dedicated attendees. We are thrilled to see the continued excitement students have around these signature workshops.

Check back in the Spring for another Training the Street Session!

## From DoG Street to Wall Street Conference



The 17<sup>th</sup> Annual DoG Street to Wall Street was conducted on Thursday, September 7<sup>th</sup> to Friday, September 8<sup>th</sup>. The Howard J. Busbee Finance Academy, Boehly Center & Office of Career Development & Professional Engagement spent the past few months arranging the program and speakers. It was a huge success with 220+ students in attendance across the two-day event (110+ being first year and sophomore students) and 30 speakers occupying positions in 22 companies across 8 industries.



**Jessica (McAnnery) Burt '02**, Head of Global Platform and Business Strategy for BlackRock Investment Stewardship, and **Bill Burt '00**, Chief Operating Officer for Galaxy Asset Management, gave a spectacular keynote talk discussing where they found opportunity and success in their careers and at William & Mary. In addition, **Greg Shenkman '03**, Trader at Shenkman Capital Management, was awarded the 2023 Howard J. Busbee Finance Academy Alumni Award.



The program consisted of series of networking sessions and panels on a broad variety of

topics from W&M alumni and guests within their respective industries. Topics included: early career success, asset & wealth management, private equity, investment banking, venture capital, consulting, and more. Students of all majors and academic years were welcomed to explore the wide variety of opportunities in finance.

[Conference Schedule](#)

[Panelist Information](#)

[Program of Events](#)

Contact the Boehly Center to be involved in next year's conference!

## Commercial Real Estate Course



This one-credit class offers an engaging introduction to commercial real estate finance. Led by industry experts, students are gaining valuable insights into the current state of the commercial real estate finance market, delving into the roles of deal participants, exploring various commercial real estate asset classes, and mastering the art of valuing these transactions.

Before the initial course meeting, students were assigned pre-work to complete. The course spans three Saturday classes and one Thursday night lecture.

The course leaders are **Tiffany Theriault '10** and **Ben Israel '10** of Apollo Global Management. Accompanied by speakers, **Rene Theriault '99 (University of Virginia), J.D. '02 (Harvard)** and **Bradley Weismiller '03**. **Dr. Julie R. Agnew '91, Ph.D. '01 (Boston College)** and Teaching Assistant **Shomik Ghoshal '24** are the course facilitators.



Notably, the class features guest lectures and culminates in a final group project and presentation to industry leaders. Successful completion of the course entails active and engaged participation, as well as collaboration in group work.

After finishing this course, students will be equipped with the knowledge to make an informed career choice in commercial real estate finance. They will also develop the

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## Peer Mentorship Program Fall Semester Kickoff Event



The Peer Mentorship Program, coordinated by SWS, WIB, and FA, matches high-achieving upperclassmen who have professional and advanced curricular experiences with engaged students who are seeking to follow in similar career footsteps. Its aspiration is to create an expansive, yet personable, program that allows William & Mary mentors the opportunity to give back to the tight knit business school community and mentees the chance to receive guidance from their older peers.

Each semester, the program takes place over five weeks and each week focuses on a single aspect of professional development, such as resume writing and behavioral interviews. The program coordinators provide the mentors with supplemental materials and guiding discussion questions, and the mentees also have access to group workshops.

On September 27th, Peer Mentorship Program coordinators, **Connor McLaren-Finelli '24**, **Maired Stack '25**, and **Alysha Waseem '24**, gave a presentation of the program to student mentors and mentee. Those participating in the program had the opportunity to be introduced and mingle among each other. This was an informal event prior to the start of their professional and academic development over the Fall Semester. The evening welcomed 55 students.

Peer mentors will be granted a free coffee voucher that can be used during their weekly meeting. This is done in partnership with Aramark campus dining.

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## Finance Specialty Courses for Spring 2024 Apply Today!

Apply now to be considered for the finance specialty experiential courses listed.  
**Application review begins Monday, October 10!**

**Applied Financial Concepts** - Led by Professor Glenn Crafford, 3-credits, exposes students to practices and recent developments within several specialized areas of the financial services sector through case presentations. Successful alumni practitioners will travel to campus to interact with students and judge cases.

[Applied Financial Concepts Application](#)

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

pitch the stocks and select which securities are bought in the portfolio!

## Student Managed Investment Fund Application

**Hedge Fund Management** - Led by Professor Matt Siano, 1-credit, gives students a broad, multi-faceted overview of the hedge fund industry and what is needed to launch one's own hedge fund(s) and hedge fund manager(s). This course meets over 2 weekends: the first being the weekend before spring semester starts and the 2nd on following weekend.

## Hedge Fund Application

# Financial Literacy Program Personal Finance - October 2nd

**The Financial Literacy Program presents:**

**PERSONAL FINANCE 101**

October 2nd, 2023  
5:30 PM  
Brinkley Commons:  
Miller Hall Room 2025

Raymond A. Mason  
School of Business  
WILLIAM & MARY  
THE BOEHLY CENTER  
FOR EXCELLENCE IN FINANCE

**JOIN US AS WE INTRODUCE...**

**A** ANTICIPATE: YOUR FINANCES  
**S** SAVING: FOR A RAINY DAY  
**S** SPENDING: RESPONSIBLY THROUGH BUDGETING  
**E** ENDOW: YOUR FUTURE THROUGH INVESTING  
**T** TRUSTWORTHINESS: CREDIT SCORES AND LOANS

**MEET THE TEAM:**

**REGISTRATION:**

TO RESERVE YOUR SPOT, REGISTER BY SEPTEMBER 30TH!

HAVE QUESTIONS?  
EMAIL OUR COORDINATOR - CHARLES TAI  
AT [CTAI@WM.EDU](mailto:CTAI@WM.EDU)

**AND MORE!**



On October 2nd at 5:30 PM in Brinkley Commons the Financial Literacy Program Peer Educators hosted a night for 23 students to learn about Personal Finance. They discussed saving, spending, investing, and more. There was also pizza and a game!



# Intro to SQL Workshop Apply Now by October 16



Students can now apply for a chance to receive hands-on SQL software training during the in-person workshop held Friday, November 10, 9 AM - 5 PM (includes one hour lunch

break).

Application review and admission decisions will be made on a rolling basis beginning Monday, October 16.

[Apply HERE](#)

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## Mason Investment Club

### Speaker Michael Fairbanks - October 19th

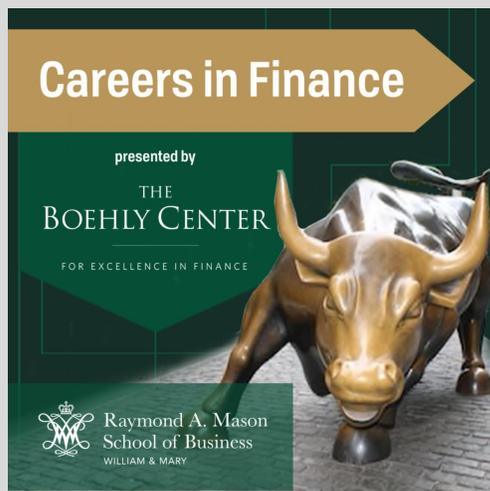
Michael Fairbanks is an Equity Research Analyst at JP Morgan Investment Bank focusing on Alternative Energy and Services. He will cover topics on October 19th regarding his experience starting in equity research and how he has navigated the process of breaking in.



[Interest Form HERE](#)

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## Careers in Finance



**Episodes are LIVE!**  
Click episodes below to listen!

[Commercial Real Estate Investments](#)

[Career Preparation - Before the Job Offer](#)

[Prepared for Success - The Power of LinkedIn & Your Network](#)

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CONNECT-LEARN-EXPLORE

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](mailto: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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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](#).