



## FREQUENTLY ASKED QUESTIONS (FAQS)

### What are some key dates to save?

- **Wednesday, November 1<sup>st</sup>, 2023:** Team registration opens
- **Wednesday, December 6<sup>th</sup>:** Team registration due date
- **Friday, December 8<sup>th</sup>:** Target date for notifying accepted Teams
- **Friday, January 5<sup>th</sup>, 2024:** Deadline to accept or decline invitation to pitch
- **February 21<sup>st</sup>:** Virtual coaching session
- **April 5<sup>th</sup> & 6<sup>th</sup>:** All in-person Women's Stock Pitch (WSP) at William & Mary (W&M)

### **What is the application process for teams?**

1. Form a team of three to four potential team members from the same university. (If your team competed at a previous Women's Stock Pitch Competition at William & Mary, at most, only one of those team members may join this year's team.) Resumes and email addresses will be required for each team member at the time of application. A team captain will also need to be named in the application. The team captain will be expected to receive updates from W&M and pass along to the remainder of the team...so ensure to choose the most responsive person to take on this role.
2. Identify a staff or faculty member at your university who consents to serve as the team's university contact. While the team captain will be responsible to respond to W&M's inquiries, W&M may contact the university contact in case of an emergency, with key information, etc. Obtain the advisor's email address and phone number.
3. **Complete the official team application form on W&M's WSP website ([AT THIS LINK](#)) by December 6<sup>th</sup>, 2023 at 11:59 PM.** Each team needs only submit a single application. Prepare the following to complete the application:
  1. **Team Details:** Provide each potential team member's first name, last name, email address and resume. Designate which team member will serve as the team captain who will be responsible for receiving updates from W&M and passing along to the remainder of the team.
  2. **Staff/Faculty Advisor:** Provide the first name, last name, position title, email address and phone number of the designated staff/faculty advisor who has agreed to serve as your team's point-of-contact.
  3. **Executive Summary:** Choose a stock that you expect to outperform the market in the next year and write a one-page executive summary explaining why your team chose this stock. Upload your document in PDF format.
  4. **Team Statement:** Please describe in 250 words or less why your college's team is interested in participating in the 2024 Women's Stock Pitch Competition at William & Mary. What does your team hope to gain from the experience? Upload your document in PDF or Word format.
4. Watch for an official email invitation to participate in the WSP and respond ASAP if selected. W&M aims to email WSP admittance decisions to the team captains



by Friday, December 8<sup>th</sup>. Keep watch on email and respond to accept or decline the invitation ASAP by January 5<sup>th</sup>, 2024.

**I'm having registration issues, who should I contact?** Reach out to Program Director, Abby Everard at [abby.everard@wmbsf.org](mailto:abby.everard@wmbsf.org) for assistance with registration.

**Can our school have more than one team?** Twenty-four (24) teams will be accepted with only one team representing each university. Each team will be asked to provide a faculty advisor or contact as part of the initial application process.

**How many people should be on a team? Are there any restrictions on who can apply?** The Women's Stock Pitch Competition is an undergraduate competition and there is no restriction as to academic year (senior, junior, etc.) or major. One team member must apply by the application deadline on behalf of the team and, if selected, all members must participate in the virtual coaching session on Wednesday, February 21<sup>st</sup>. If your team competed at a previous Women's Stock Pitch Competition at William & Mary, at most, only one of those team members may join this year's team.

**Do all team members have to identify as a woman?** The Women's Stock Pitch & Leadership Summit is an inclusive event and in compliance with William & Mary's commitment to diversity and inclusion. To find out more please visit: [www.wm.edu/offices/compliance/discrimination\\_overview/nondiscrimination/index.php](http://www.wm.edu/offices/compliance/discrimination_overview/nondiscrimination/index.php)

**When will teams be selected and informed if they are competing?** Teams will be informed they have been selected by Friday, December 8<sup>th</sup>, 2023.

**What if our team is not selected? Can we still be involved?** Only selected stock pitch teams and confirmed W&M students are eligible to attend the event on April 5<sup>th</sup> and 6<sup>th</sup>.

**What is a waitlisted team?** The competition permits 24 teams to compete. A waitlisted team is a team that is not within the initial 24 teams but if a team is unable to attend, the waitlist may be invited to compete.

**What accommodations are provided to teams?** We are thrilled to offer two complimentary hotel rooms per team, and transportation to-and-from the hotel to W&M's campus on stock pitch days and three meals(Friday dinner, Saturday breakfast and Saturday lunch) per team member.

**What costs are reimbursed?** Each team will receive up to \$1,000 transportation reimbursement. Transportation includes flights, ground transportation, etc. To be reimbursed for participating in the William & Mary Women's Stock Pitch, attendance is required at the virtual coaching session and 100% of programming at the WSP, unless an excused absence is approved.



**How do we get refunded?** The team captain will submit each team's travel purchases, will receive the reimbursement on behalf of the team and then will distribute the reimbursed funds to their team members.

**What is the schedule for April 5th?** See the [2024 Event Schedule](#) document on W&M's WSP website for the most up-to-date event day schedule.

**What will be the format of the stock pitch competition?** The event will begin with preliminary round and second round stock pitches, followed by a networking session with alumni and corporate partners. In the afternoon, we will have the final round of stock pitches, where the final few teams will pitch in front of an audience.

**What is the Virtual Coaching Session?** The Virtual Coaching Session allows teams to receive preliminary feedback on their stock pitch from financial services industry professionals or W&M engagement staff. Teams should prepare to drive the conversation with their assigned coach. Teams can use this opportunity to discuss their research and approach, present their stock pitch for feedback or simply engage in networking with their assigned coach. This is an excellent chance for the team to expand their network while receiving real-time feedback if they so desire.

**What guidelines should I follow when creating a pitch?** Stock pitch teams will present a "buy" recommendation of a stock of their choice for an endowment fund with a twelve-month holding period. The standards for what constitutes a "buy" can differ widely among professionals and the context of the decision. For this competition, a "buy" will imply the stock's expected total return (dividend yield and price appreciation) over the coming 12 months will exceed a long term, broad market average return of 10%. Deliverables include a ten-minute PowerPoint presentation and a two-page executive summary.

**Who can I contact with additional questions?** Reach out via email to Abby Everard at ([abby.everard@wmbf.org](mailto:abby.everard@wmbf.org)) or the Boehly Center ([Boehly.center@mason.wm.edu](mailto:Boehly.center@mason.wm.edu)) for more information.

For more information, see the official **Women's Stock Pitch** website: [mason.wm.edu/wsp](http://mason.wm.edu/wsp)