



Raymond A. Mason
School of Business
WILLIAM & MARY

THE
BOEHLY CENTER

FOR EXCELLENCE IN FINANCE

A large, stylized orange 'W' logo that resembles a line graph with three peaks and two valleys.

WOMEN'S STOCK PITCH

APRIL 5-6, 2024

mason.wm.edu/wsp

The Women's Stock Pitch is an inclusive event in compliance with William & Mary's commitment to diversity and inclusion. To learn more, please visit:

<https://www.wm.edu/offices/ce/compliance/nondiscrimination-notice/>



COMPETITION AGENDA

Friday, April 5, 2024

2:00 - 3:00 PM

Stock Pitch Teams Check-In

Raymond A. Mason School of Business; Miller Hall

3:00 - 4:30 PM

Corporate Partner Career Information Sessions

Miller Hall; Classroom 1088 & 1008

4:30 - 5:15 PM

Networking Cocktail Reception

Miller Hall; First Floor Atrium

5:30 - 7:30 PM

Dinner & Keynote Speaker - Lisa Petrelli

Miller Hall; Brinkley Commons

Stock Pitch Rounds Process

Each round includes three 10-minute pitches each followed by a 10-minute Q&A from the judges. Five minutes is allotted for switching teams.

Round One: 24 teams, 3 teams per room, 8 pitch rooms,
3 sets in this round

Round Two: 8 teams, 2-3 teams per room, 3 pitch rooms,
3 sets in this round

Final Round: Final 3 teams will pitch in Brinkley Commons
Teams will pitch in randomized order



COMPETITION AGENDA

Saturday, April 6, 2024

7:30 - 7:50 AM Stock Pitch Teams Check-In
Raymond A. Mason School of Business; Miller Hall

8:00 - 9:10 AM Round One
Miller Hall Classrooms

10:00 - 11:10 AM Round Two
Miller Hall Classrooms

10:00 - 11:30 AM Corporate Partner Industry Expo
Miller Hall; First Floor Lounges

11:50 - 1:00 PM Final Round
Miller Hall; Brinkley Commons

1:00 - 1:45 PM Lunch & Judges Deliberation
Miller Hall; Brinkley Commons

1:45 - 2:15 PM Keynote Speaker - Catherine Faddis '91
Miller Hall; Brinkley Commons

2:15 - 2:35 PM Winner Announcement & Closing Remarks
Miller Hall; Brinkley Commons

2:35 - 2:50 PM Group Attendee Photo
Miller Hall; First Floor Atrium



WELCOME

Greetings and a warm welcome to the 8th annual William & Mary Women's Stock Pitch Competition (WSP)! Since its inception in 2016, this event has grown from a gathering of fourteen teams from across the U.S. to a prestigious global stock pitch competition. This year, we are thrilled to host twenty-four teams not only from various states in the U.S. but also from schools in Australia, Canada, England, Israel, and Singapore, creating opportunities for cross-cultural exchanges and fostering a global atmosphere for mutual learning and connections that is at the heart of our event.

We are honored to introduce our distinguished keynote speakers, Lisa Petrelli and Catherine Faddis '91, whose outstanding accomplishments in finance, combined with their unique international backgrounds, provide them valuable and distinctive perspectives to offer us. Their willingness to impart their expertise is deeply appreciated, and we eagerly anticipate their insights.

When reflecting on the evolution of our stock pitch over the years, it's evident that it has surpassed our initial expectations. In our welcome letter back in 2016, we expressed our aspirations for this event to foster personal growth, exploration, and engagement among our participants. Little did we anticipate the enduring positive impact it would have on our guests.

For example, we have been delighted to hear stories from past student attendees of how connections forged at this event have led to internships, job opportunities, and the expansion of international professional networks. Many former participants have shared how people they met here have become invaluable resources in their post-graduation endeavors, while others have discovered entirely new career paths previously unknown to them. To our 2024 student participants, we hope that you, too, will have similar experiences to share with us in the future.

This event is crafted for you, and we urge every student to seize this opportunity. Engage with peers from other universities, explore career options with our corporate partners and professionals, and, if you are competing, refine your investment skills by embracing feedback from our esteemed judges. By participating today, you become part of a special community, one that we are committed to



Julie Agnew '91
Executive Director of the Boehly Center for
Excellence in Finance
Richard. C. Kraemer Term Professor of
Business

Continued on page 5



WELCOME

fostering for the long-term. Please join our new and exclusive LinkedIn Group (scan the QR code at the end of this letter) to facilitate ongoing networking with fellow attendees, past and present, enhancing your personal career development journey.

To our esteemed professionals and judges in attendance, your unwavering support, mentorship, and passion for nurturing student talent are the cornerstone of this event's success. We extend our deepest gratitude for your invaluable contributions and time.

To our corporate partners and generous donors; Matthew B. Siano '96, J.P. Morgan, StoneX, Alice Davison P'16, MUFG, the Shenkman Family, EY, State Street, The London Company, RBC, Harding Loevner, CCMP Capital, Fidelity, Yacktman Asset Management, Fran Engoron '70, UBS, CAPTRUST, Wells Fargo, Raymond James, BMO, and Jordan Partners, your investment in our student participants is instrumental in making this event possible. Thank you for your ongoing commitment to empowering the next generation of finance leaders.

We are also immensely grateful to Matthew Siano '96, who has taken on a leadership role in financing this event this year. He has been a supporter and judge since the inception of the stock pitch, providing constant assistance and guidance behind the scenes, and has played a pivotal role, alongside the advisory board, in shaping the event into what it is today. Our deep gratitude extends to our Advisory Board members (Alexander Blaha '13, Cindy Davis '80, Rebecca Freiheit '12, Lauren Jacobson '07, John Leone '91, Lauren Malafronte, Lisa Petrelli, and Lindsey Whittaker '22), whose unwavering dedication to this event is truly remarkable and whose involvement significantly contributes to its success. Additionally, we extend our appreciation to Todd and Katie Boehly, founders of the Boehly Center for Excellence in Finance. Without them this event and others would not be possible.

We extend heartfelt thanks to all individuals who have played integral roles in bringing this event to fruition. Leading the planning and execution is Abby Everard. Given the complexity of this event, we are grateful for her dedication, can-do attitude, and boundless energy! Abby's close collaborator and Boehly Center lead is Dannita Trice, Director of Boehly Center Engagement & Operations. We appreciate the incredible attention she has devoted to this event. Abby Berry '23 serves as our outstanding Boehly Fellow, expertly managing our student-facing tasks, and her contributions are invaluable. Other crucial members of the Boehly team include Dezire Morris and Kimi Dornan. Furthermore, we have exceptional student leadership on the planning committee, including Ashley Diem '24; Uma Datar '26 and Mairead Stack '25, Co-Presidents of the newly merged student club, Smart Woman Securities/Women In Business; and Grishma Baruah '25, Past President of Smart Woman Securities, whose positive attitudes and enthusiasm are contagious.

Continued on page 6



WELCOME

Lastly, we express our gratitude to the officers and members of our Smart Woman Securities/Women In Business club, our student ambassadors tasked with ensuring everyone feels welcome and valued at this event, and to our school leadership, Dean Todd Mooradian, Vice Dean Mindy Schuster, Vice Dean Kimberly Smith, Kimberly Sperling, and Anthony Ball. We also acknowledge the significant contributions and voluntary efforts of Boehly Center Board members, Boehly Center student staff, Andrew Gilstrap and John Dutro, our facilities staff, Jim Haltiner, and Brett Hammond. Finally, we are delighted that Alice Davison P'16 is here. She provided the seed funding for the original event and was the inspiration behind starting it. Your dedication and support are truly appreciated.

Sincerely,

Julie Agnew '91

Executive Director of the Boehly Center for Excellence in Finance

Richard. C. Kraemer Term Professor of Business

JOIN US ON LINKEDIN

Stay connected during and after the 2024 Women's Stock Pitch within the event's exclusive LinkedIn Group. All students, corporate partners, and distinguished guests are invited to join and engage.

2024 Women's
Stock Pitch

Linked in
GROUP





OUR MISSION STATEMENT

The Women's Stock Pitch Competition brings together outstanding students from top-ranked universities around the world. This event is organized by William & Mary's Smart Woman Securities/Women in Business club and the Boehly Center for Excellence in Finance. Participating teams gain invaluable exposure and real-world experience through researching and presenting an investment opportunity with a long-term horizon. Representatives from leading financial firms judge the competition and are eager to engage with some of the brightest young students in the world.

The goal of the competition is to inspire students from a variety of backgrounds to pursue careers in finance. We seek to encourage diversity in all forms, recognizing that people with diverse identities, backgrounds, and experiences think and solve problems in creative ways. Such efforts are proven to provide businesses with a distinct competitive advantage.

The Women's Stock Pitch 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/ce/compliance/nondiscrimination-notice/>



Boehly Center For Excellence in Finance

The Boehly Center for Excellence in Finance was established in January 2014 through a generous multi-year gift from alumni Todd & Katie Boehly. Benefiting from an exceptionally talented and motivated student body, the Boehly Center is training the next generation of leaders in finance.

The Center provides opportunities for advanced financial training, career exploration, networking, and experiential learning through financial firm sponsored competitions and courses taught by industry leaders. The Center also offers leadership opportunities for members in our three student-run clubs: the Howard J. Busbee Finance Academy, the Mason Investment Club, and the Smart Woman Securities/Women In Business Club. Several student-run programs, the Peer Mentorship Program, Peer Industry Advisors, and the Financial Literacy Program, provide additional opportunities to lead.

Our Competitive Advantage

Through students' close interaction with faculty and other students, the Boehly Center capitalizes on William & Mary's ideal size and offers programs to students across campus, not only Finance majors. These opportunities allow students of all backgrounds to utilize W&M's rich alumni network in the financial services industry. Our graduates are currently working in finance at top firms including: Bain & Company, Boston Consulting Group, Bank of America, BlackRock, Capital Group, Capital One, Citigroup, EY, Eldridge, Fidelity Investments, Goldman Sachs, Google, Guggenheim, IBM, JPMorgan Chase, MUFG, McKinsey, Morgan Stanley, Perella Weinberg Partners, PwC, RBC Capital Markets, State Street, T. Rowe Price, TD Group, UBS, and Wells Fargo.

THE
BOEHLY CENTER

FOR EXCELLENCE IN FINANCE



Todd Boehly '96

CHAIRMAN & CHIEF EXECUTIVE OFFICER, ELDRIDGE INDUSTRIES

As Co-Founder of the Boehly Center for Excellence in Finance at William & Mary, Todd offers guidance through his extensive experience in the financial space. Todd is Co-founder, Chairman, and Chief Executive Officer of Eldridge Industries. Eldridge Industries employs more than 3,000 people and has made investments in over 70 operating businesses, including Security Benefit, of which Todd is Chairman, dick clark productions, A24, Fulwell 73, and Penske Media, which includes The Hollywood Reporter, Variety, Billboard, Rolling Stone, Vibe, Music Business Worldwide, Life is Beautiful, and the investment in South by Southwest.

Todd is Chairman of Chelsea Football Club and an owner of the Los Angeles Dodgers, the Los Angeles Lakers, the Los Angeles Sparks, Cloud9, and DraftKings. He is on the boards of the Los Angeles Lakers, Flexjet, PayActiv, CAIS, Chelsea Football Club, Cain International, Kennedy Wilson (NYSE: KW), and Vivid Seats (NASDAQ: SEAT). Mr. Boehly was formerly on the boards of Truebill, which was sold to Rocket Mortgage, and DraftKings. Prior to founding Eldridge Industries, Todd was President of Guggenheim Partners and founded the credit business at Guggenheim. He received his B.B.A. from William & Mary, where he later founded The Boehly Center for Excellence in Finance, and studied at the London School of Economics. Mr. Boehly supports epilepsy research, Focused Ultrasound Foundation, Prostate Cancer Foundation, Brunswick School, and William & Mary.

Katie Boehly '95

Katie Boehly is co-founder of the Boehly Center for Excellence in Finance at William & Mary. Founded in January 2014, the Boehly Center provides students advanced financial training, career exploration, networking, and experiential learning through financial firm-sponsored competitions as well as through industry-leader and dedicated faculty-taught courses. Mrs. Boehly previously worked at ADP, Court Express, and currently serves on the advisory board for FACES (Finding a Cure for Epilepsy and Seizures) and the Texas



Christian University Board of Trustees. A graduate of William & Mary with a B.A. in History, Mrs. Boehly is a member of the College's Society of 1918.



Meet the 2024 Teams



Angela Cheng - Business Admin & Statistics Major
Sally (Siyang) Ma - Business Admin & French Major
Linqi (Linda) Rao - Business Admin Major

Nahrin Habib - Finance and Marketing Major
Shivani Sharma - Finance & Management Major
Olivia Slivinski - Finance Major
Maggie Traverse - Finance Major



Aysha Asif - Business Admin & Management Major
Dana Darcy - Economics Major
Wendy Tlalmanalco - Economics Major

Simone Chatterjee - Economics Major
Elizabeth Fogassa - Economics Major
Sally Gaither - Undeclared



Shiri Liberman - Business Admin & IR Major
Orpaz Weisman - Business Admin & Psychology Major
Rona Yaniv - Economics & Psychology Major



Meet the 2024 Teams



INDIANA UNIVERSITY

Kirtee Ayitha - Finance Major

Shreya Goda - Marketing Major

Ananya Kondur - Finance, Business Analytics,
Digital Technology Mgmt Major

Ella Coulter - Finance & Business Econ Major

Kelsey Koch - Finance & AIM Major

Melissa McMahon - Finance & Business Admin Major

Catherine Taphorn - Finance & AIM Major



**MARQUETTE
UNIVERSITY**



Emily Gagné-Hedderson - Commerce & French Major

Erica McShane - Commerce Major

Abigail Martin - Commerce Major

Sarah Smith - Commerce Major

Charisse Chin - Business Admin & Economics Major

Paige Soh Si Ying - Business Admin & Analytics Major

Xuantong Tan - Business Admin & Geography Major

Clarice Wee - Business Admin Major



NUS

National University
of Singapore



NYU

Liya Chen - Business Major

Isabel Kong - Business Major

Erika Lei - Economics and Data Science Major

Nicole Zhao - Business Major



Meet the 2024 Teams



Lucy Fang - Philosophy, Politics, & Economics Major
Xilin Gu - Economics & Management Major
Sophie Keenan - Mathematics Major

Lauren Collins - Accounting Major
Arlyn Kryst - Finance Major
Payton Limkakeng - Finance Major
Michelle Zheng - Finance Major



PennState



Madeline Castro - Finance Major
Carolyn Cumello - Finance Major
Isabella DeLeo - Finance Major
Lily Dworak - Finance Major

Amanda Chen - Accounting & Data Science Major
Hope Pu - Accounting & Finance Major
Shruthi Sathyanarayanan - Accounting & Finance Major
Ting Zhao - Accounting & Finance Major



ILLINOIS
UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN



Charu Bajaj - Managerial Economics Major
Tue Minh Nong - Finance Major
Trisha Raj - Finance Major
Sukanya Sinha - Economics & Biochemistry Major



Meet the 2024 Teams



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

Arya Alurkar - Business Admin & Public Policy Major
Diya Bhatt - Business Admin & Physics Major
Madhu Chinta - Business Admin Major
Isabella Vu - Business Admin Major

Paris Fear - Finance Major
Blair Kedwell - Finance & History Major
Kate Norman - Finance & Economics Major
Riley Russo - Finance & Economics Major



UNIVERSITY OF
NOTRE DAME



Penn
UNIVERSITY of PENNSYLVANIA

Risha Bhat - Economics Major
Hope Cheung - Economics Major
Tori Ling - Economics & Mathematics Major
Anushka Tripathi - Economics Major

Molly McKay - Economics Major
Morgan Powell - Statistics & Economics Major
Isha Shah - Finance & Business Information Sys. Major
Lynn Thomas - Finance & Business Information Sys. Major



University of
Pittsburgh



THE UNIVERSITY OF
SYDNEY

Amelie Kumarasinghe - Finance & Economics Major
Grace Lee - Finance Major
Chloe Nel - Finance & Computer Science Major
Anna Newman - Finance & Law Major



Meet the 2024 Teams



TEXAS

The University of Texas at Austin

Maahika Saini - Finance Major
Srjana Srivatsa - Computer Science Major
Katherine Yan - Finance & Economics Major
Grace Zhu - Business Admin Major

Grace Aspittle - Finance Major
Kaiya Green - Finance & Accounting Major
Augustina Gularte - Finance & Economics Major
Emerald Spencer - Ops. & Supply Chain Major



Kennedy Kabance - Finance Major
Salma Khorramshahgol - Finance Major
Maya Snyder - Industrial & Systems Engineering Major

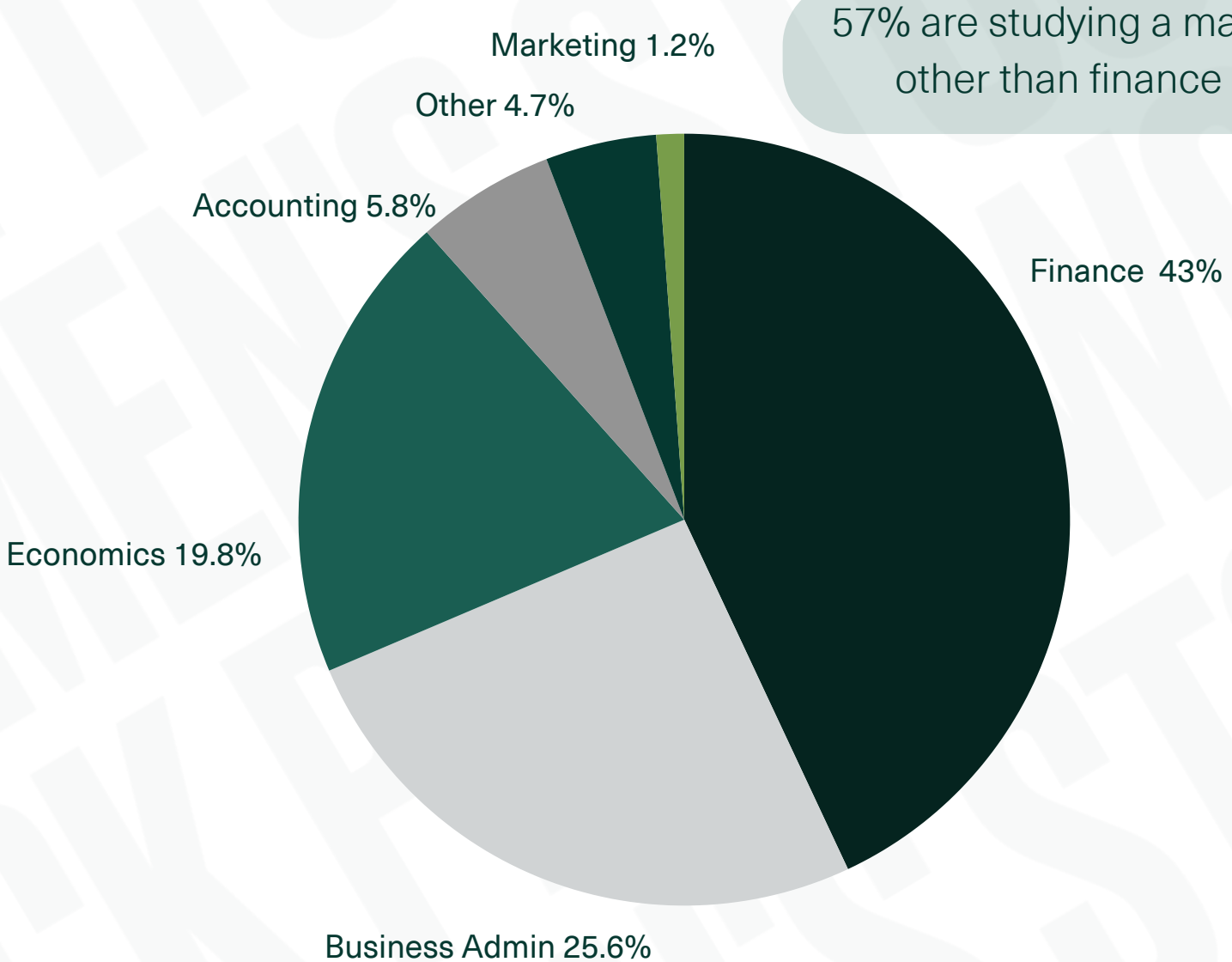
Elizabeth van der Voort - Finance & IR Major
Abigail Hausladen - Finance Major
Kendyl George - Finance Major
Sylvia Shklyar - Economics Major



Raymond A. Mason
School of Business
WILLIAM & MARY



2024 Team Participant Data & Event Facts



57% are studying a major other than finance

Average GPA: 3.78

2024 marks the largest number of participating teams at 24 teams

Thirty seven participants have two or more majors

Five international teams



Catherine “Cate” Faddis '91, CPA, CFA, MBA

Keynote Speaker



As a portfolio manager, Cate serves both individual and institutional clients. Cate leverages her enthusiasm for fundamental research and valuation and her depth of knowledge to help her clients meet their financial goals.

Cate has over 25 years of experience in investment management and financial services. Before joining Zevin Asset Management, Cate was the President and Chief Investment Officer of Grace Capital and Managing Partner at Mason Capital Partners, a firm Cate grew from assets under management of \$100M to over \$1B. Cate started her career as an Auditor and CPA at Deloitte, and then became an Equity Analyst at Putnam Investments covering global and

emerging market banks (Spain, South Africa, Switzerland, and Latin America). She serves on the Executive Board of the Boston Economic Club, the Board of Directors of La Tienda Corp and is a Corporator for the Cambridge Savings Bank. She has been a frequent guest correspondent on CNBC and Bloomberg Markets. She earned a BBA from William & Mary and an MBA from Harvard Business School. Cate is a CFA charter holder and member of the CFA Institute.

Having lived in Ghana, Pakistan and Spain, Cate is passionate about economic development, youth employment, and the effects of climate on vulnerable population groups. Cate is multilingual, a proud mother of twins, and a beekeeper.



Lisa Petrelli, MA, CFA, ICD.D

Keynote Speaker

Lisa Petrelli is a Managing Director, Acting Country Head and Head of Global Markets for Canada at UBS.

Lisa bears all regulatory, operational and risk supervision and management for the IB in Canada and has oversight to UBS Canada Wealth Management and Asset Management divisions. Lisa is the Canada Country Representative at the UBS Americas Country Risk and Operational Management Committee and UBS' Extended Americas Management Committee. In addition to these roles, Lisa is Board Member and UDP of UBS Securities Canada, Inc.

Lisa has over 25 years of experience on Wall Street. Prior to UBS, Lisa has worked at Goldman Sachs, Credit Suisse and Morgan Stanley, and held roles across all public market platforms dedicated to global sales, trading and capital markets.

Lisa has been an active participant through her career in diversity and gender initiatives. She is a current Board Member for 100 Women in Finance, and is on the Advisory Board for the Raymond A. Mason School of Business at William & Mary. Lisa is a founding member of UBS' Women of Investment Bank and is part of the IB's Diversity and Inclusion Council. Lisa is a past participant on the Governing Council at the University of Toronto (UTM) and a past Women in Capital Markets Board Member.

Lisa is an undergraduate from the University of Toronto, and has a Master of Arts degree from Wilfrid Laurier University. Lisa is a CFA charter holder and Institute of Corporate Directors Director designation.





Keynote Moderators

Matthew B. Siano '96

Matthew B. Siano, Esq., is currently a William & Mary Business School Foundation Trustee and a Managing Director – Emeritus of Two Sigma Investments LP and its various U.S. and non-U.S. affiliates, a group of global investment managers and broker-dealers specializing in quantitative and discretionary investing advising and market making across a broad range of asset classes (Two Sigma). Two Sigma currently manages numerous hedge funds, private investment pools, private equity funds, managed accounts, joint ventures and registered investment products with well over \$45 billion in third-party assets under management. Prior to becoming a Managing Director - Emeritus, Mr. Siano served as Managing Director, General Counsel of Two Sigma for over nineteen (19) years. In his role as Two Sigma's General Counsel, Mr. Siano was responsible for the firm's legal, regulatory, compliance and government affairs matters and was the global head of their legal, compliance and government affairs departments.



From September 1999 through June 30, 2004, Mr. Siano was an associate in the Investment Management Group of Seward & Kissel, LLP, a New York City headquartered law firm with an industry-leading hedge fund practice. Mr. Siano (proudly) graduated cum laude from William & Mary in 1996 with a B.A. in both Government and History. In 1999, Mr. Siano earned a J.D. from Fordham Law School, where he was the Special Publications Editor for the Urban Law Journal and a member of the Fordham Moot Court Board. Mr. Siano is also an adjunct professor on both the undergraduate and graduate levels at the Raymond A. Mason School of Business at William & Mary. He is also a frequent lecturer and presenter on hedge funds and applicable laws and regulations.



Grishma Baruah '25

2022 -2023 President of
Smart Woman Securities



Uma Datar '26

2023 -2024
Co-President of (newly
combined) Smart Woman
Securities/Women In Business



Mairead Stack '25

2023 -2024
Co-President of (newly
combined) Smart Woman
Securities/Women In Business



2024 Corporate Partners

Platinum

Matthew B. Siano '96, Esq.
The Bianca Caragliano Women In Business
Programs Endowment

Gold

J.P.Morgan
PRIVATE BANK

Alice Davison P'16

StoneX®

Silver

William & Mary



Bronze

YACKTMAN
ASSET MANAGEMENT



CCMP
CAPITAL



Fran Engoron '70

The Shenkman Family

Supporters



CAPTRUST



JORDAN
PARTNERS

BMO



UBS

RAYMOND JAMES



Advisory Council



Alexander Blaha '13
Senior Strategy Associate
Elidridge Industries



Cindy Davis '80
William & Mary Foundation
Board Member



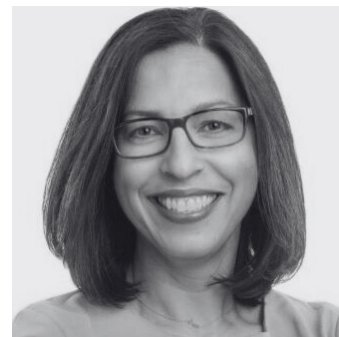
Becca Freiheit '12
Senior Manager
Financial Services Consulting
EY



Lauren Jacobson '07
Chief Investment Officer
Hamilton College



John Leone '91
Managing Director - Head
of Quantitative Strategy
Wells Fargo



Lauren Malafronte
Business Development
Avenue Capital



Lisa Petrelli
Managing Director - Country
Head and Head of Global
Markets, Canada
UBS



Lindsey Whittaker '22
Fixed Income Research Associate
Fidelity Investments
Past Post-Baccalaureate Fellow, 2022 Women's
Stock Pitch, Boehly Center for Excellence in Finance



First & Second Round Judges



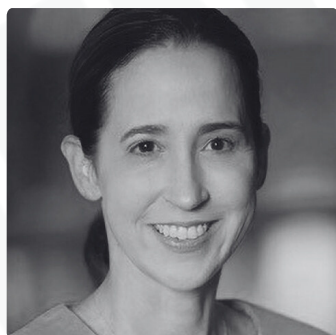
Craig Armstrong '92

Senior Portfolio
Manager
at Insight Investment



Biff Baker '90

Managing Director &
Senior Wealth Advisor
at
MAI Capital
Management



Hilary Corman P'27

Head of Enterprise Sales
at State Street Global
Advisors



Whitney Crawford '07

Portfolio Manager,
Director of Research
& Analyst at
Polen Capital



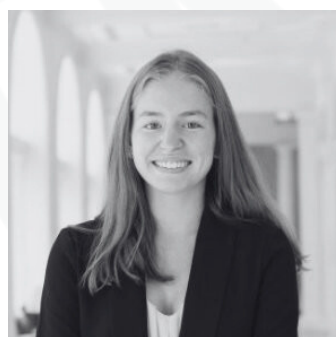
Alex Don '17

Vice President
at MUFG



Fran Engoron '70

William & Mary
Foundation Trustee
at William & Mary



Caity Farr '20

Equity Research
Analyst at
Fidelity Investments



First & Second Round Judges



Matthew Fiordaliso

'04, M.ACC '05

Partner, Head of Product
at Ai SPARK



Scott Gehsmann '84

Recently Retired Deals
Partner at PWC



Katie George

Institutional Business
Development
at Harding Loevner



H. Brett Hammond

Adjunct Professor
at Raymond A. Mason
School of Business,
William & Mary



Ann Marie Higgins

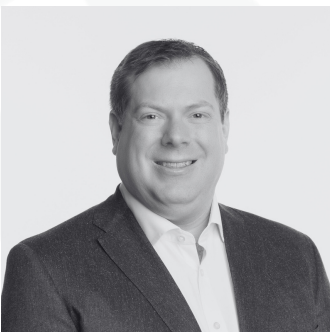
'06, M.ACC '07

Partner at EY



Laura Holden '06

Managing Director,
M&A at
BMO Capital Markets



Jon Lamb '07

Portfolio Manager
at Orion Resource Partners



Audra Mallow '90

Principle at Long
Course Capital



First & Second Round Judges



Mark McFadden '99

Co-Managing Partner
at CCMP Capital



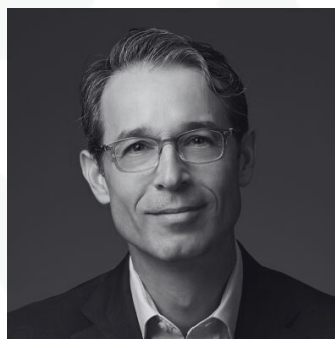
Ed McGann '82

Managing Director,
Global Head FX
Platforms Business
Development
at BNY Mellon



Brad Miller '83

CFO Consultant



David Musto '89

CEO & Global
Chairman at
Ascensus



Molly Nissman

M.B.A '20 P'18

Vice President Wealth
Management, Financial
Advisor at UBS



Leila Peck

Vice President,
Financial Advisor
at Morgan Stanley



Greg Pieroni

Managing Director
at UBS



Molly Pieroni '90

President and
Partner
at Yacktman Asset
Management LP



First & Second Round Judges



Phil Roane '06

Senior Merger and
Acquisitions Professional



Matthew Siano '96

Foundation Trustee
at Raymond A.
Mason School of
Business, William &
Mary



Trey Snow

Senior Research
Analyst at
The London Company



Mary Stone '98

Managing Director,
Head of Structured
Credit Banking at
StoneX Group Inc.



Erwin van der Voort

P'23 P'25

Head of Global Private
Capital Group at
RBC Capital Markets



Kevin Tunick '77

VP and Managing
Director,
Private Investments
at UNC Management
Company



Michael Vogelzang

P'24

Chief Investment
Officer at CAPTRUST



Lindsey Whittaker

'22

Fixed Income Research
Associate at
Fidelity Investments



First & Second Round Judges



Olivia Vande Woude '20

Associate Analyst
at T. Rowe Price



Brandon Wolfe '07

Co-Founder/ Partner
at Jordan Partners LLC

Final Round Judges



Alice Davison P'16

Foundation Trustee
at Raymond A.
Mason School of
Business, William &
Mary



Catherine Faddis '91

Senior Portfolio
Manager
at Zevin Asset
Management



**Gregory Melich '92
P'27**

Partner, Research
Analyst at Evercore
ISI



Lisa Petrelli

Managing Director -
Country Head and
Head of Global
Markets, Canada -
UBS



Planning Committee



Dr. Julie Agnew '91

Executive Director, Boehly
Center for Excellence in
Finance



Abby Everard

Program Director,
Women's Stock Pitch &
Associate Director of
Alumni Engagement



Dannita Trice

Director, Engagement
& Operations, Boehly
Center for Excellence in
Finance



Dezire Morris

Assistant Director,
Events & Programs,
Boehly Center for
Excellence in Finance



Anthony Ball

Director of Development,
Undergraduate and 1-Year
Residential Masters
Programs



Uma Datar '26

Co-President, Smart
Woman Securities/
Women in Business



Grishma Baruah '25

Past President, Smart
Woman Securities



Ashley Diem '23

Graduate Student
Intern, Boehly Center
for Excellence in
Finance



Mairead Stack '25

Co-President, Smart
Woman Securities/
Women in Business



Abby Berry '23

Post-Baccalaureate Fellow,
2024 Women's Stock Pitch,
Boehly Center for
Excellence in Finance



Kimi Dornan

Special Event Planner,
Boehly Center for
Excellence in Finance



EY
Building a better
working world

When will the
path to leadership
be equal?

EY is a proud sponsor of the
Women's Stock Pitch and
Leadership Summit

■ ■ ■
The better the question. The better the answer.
The better the world works.

CCMP

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<https://www.ccmpgrowth.com/>



Discover your opportunity with Mitsubishi UFJ Financial Group (MUFG), the 6th largest financial group in the world. Across the globe, we're 160,000 colleagues, striving to make a difference for every client, organization, and community we serve. We stand for our values, building long-term relationships, serving society, and fostering shared and sustainable growth for a better world.

With a vision to be the world's most trusted financial group, it's part of our culture to put people first, listen to new and diverse ideas and collaborate toward greater innovation, speed and agility. This means investing in talent, technologies, and tools that empower you to own your career.

Join MUFG, where being inspired is expected and making a meaningful impact is rewarded.

We are seeking high achievers that are intellectually curious, enthusiastic, and demonstrate strong work ethic. Individuals that work well in a collaborative environment are vital to driving our business forward. Our 10-week Corporate, Investment Banking & Markets (CIB&M) Summer Analyst Program is more than just a fascinating insight into MUFG: it is an opportunity to build the foundation for a long, rewarding career! 2024 Corporate, Investment Banking & Markets Summer Analyst Program.

At MUFG, we strive to create an inclusive environment, where everyone's perspective is valued. We are committed to diversity and inclusion in our workforce – all students are welcome to apply.

StoneX[®]

We **connect** clients to **markets**



Who We Are

StoneX is an institutional-grade financial services firm that connects world-leading companies, organizations, and investors to global markets with ease. Our commitment to investing in state-of-the-art digital platforms, end-to-end clearing and execution services, and top talent has been the cornerstone of our success. Our clients include traders and investors in nearly all securities, derivatives and foreign currency markets. Providing high-touch service to over 30,000 institutional and commercial clients, and 295,000 retail clients across more than 140 countries.

Key Facts

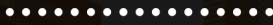
- Global access to 40+ exchanges
- 100-year track record
- Nasdaq stock ticker: SNEX
- Global headquarters: 230 Park Avenue, New York, NY
- Worldwide employees 4,000+ employees and 80+ offices

Global Program Offerings

- **Internship Programs** - North America, UK, Poland, Germany, India, Brazil, Singapore
- **New Grad Programs** - North America, UK, Poland, India
- **Apprentice Program** - UK



A proud sponsor of the Women's
Stock Pitch & Leadership Summit.



WHO ARE WE?

We help nearly 50 million individuals feel confident in their most important financial goals, manage employee benefit programs that help over 24,000 businesses support their employees' total well-being, and support more than 16,000 wealth management firms and institutions with innovative investment and technology solutions to grow their businesses.

Our diverse businesses and independence give us insight into the entire market and the stability needed to think and act for the long term as we deliver value to you.



HARDING LOEVNER

Harding Loevner is a global asset management firm in Bridgewater, New Jersey. We manage more than \$50 billion in long-only equity portfolio strategies comprised of high-quality, growing companies in developed, emerging, and frontier markets.

Harding Loevner is a proud sponsor of the Women's Stock Pitch & Leadership Summit.

Memories



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WOMEN'S STOCK PITCH



Raymond A. Mason
School of Business

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