

# W MEN IN FINANCE

## 2019-2020 Year-End Review

The Women in Finance Initiative strives to **educate**, **empower** and **mentor** undergraduate women exploring finance careers.



We aim to build an **authentic, lifelong network** of professional women who will support one another through the successes and challenges of their careers.



We seek to cultivate a strong, empowered and inclusive community of students and alumnae through *mentorship, engaging career education activities, skill development programs, leadership opportunities and exposure to leading firms in the industry.*





# WOMEN IN FINANCE

2019 - 2020 BY THE NUMBERS

## OVERALL ENGAGEMENT

**350+** undergraduate **women**

- 150+ 1st & 2nd years
- 10% non-finance majors

**80+** alumni/industry professionals

**25+** career education, skill building, networking & community building **events**

## MENTORSHIP NETWORK

**130** students in **peer mentorship network**

**31** **alumnae** mentors

**50** student mentees in **professional mentorship network**







# WOMEN IN FINANCE

## 2019-2020 MENTORSHIP

### PEER MENTORSHIP NETWORK

- Over 50 upperclass students mentored ~80 freshmen and sophomores
- Transitioned from 1:1 format to cohort-based "families" to broaden the network's support & impact
- Community building activities across network



### NYC PROFESSIONAL NETWORK

- Launched Spring 2020
- 19 students working on co-op in NYC were matched with 19 alumnae mentors working in NYC
- Program kick-off @ The Smith Midtown East & two virtual Zoom happy-hours



### "PROJECT UNIFY"

- Introduced Summer 2020 to support students feeling isolated during COVID-19
- 31 students participated in cohorts of 2-3 and were supported by 12 alumnae mentors who each took on 2 student cohorts
- Virtual format allowed us to engage alumnae in BOS, Palo Alto, LA, NYC & London.





# WOMEN IN FINANCE

## 2019-2020 MENTORSHIP

### ALUMNAE MENTORS:

#### NYC MENTORSHIP NETWORK

- Patrizia Cadel, Relationship Management, Intesa Sanpaolo
- Kelly Chen, Research Analyst, Apex Credit Partners
- Madigan Chrystie, International Equity Trading, Jefferies
- Abigail Duclos, Strategic Financial Analyst, MongoDB
- Connie E., Private Equity Analyst, Prequin
- Claire Gerdes, Equity Research Associate, UBS
- Mary King, Analyst, Backcast Partners
- Kelly Knudsen, Corporate Strategy & Development, BlackRock
- Kaitlyn Korich, Associate, Credit Suisse HOLT
- Janine Marazzo, VP, Asset Management, Goldman Sachs
- Andrea Mascarenhas, Alternatives Investment Specialist, DWS
- Neli Mihova, Analyst, Global Capital Markets, Morgan Stanley
- Erica Nesses, Lead Solutions Consultant, BNY Mellon HedgeMark
- Lizzie Norton, Senior Research Associate, Autonomous Research
- Mirasol Quintanilla, Financial Services Consultant, EY
- Stefanie Raiola, Senior Associate, Atairos
- Sara Scott, Research Analyst, Egon Zehnder
- Liz Sharp, Analyst, Neuberger Berman
- Akhila Thota, Capital Markets Analyst, Scotiabank

### ALUMNAE MENTORS:

#### PROJECT UNIFY

- Mallory Brown, Finance Manager, Johnson & Johnson (PA)
- Jackie Cahill, Senior Associate, Operations Analytics, SCS Financial (MA)
- Victoria Cameron, Investment Officer, Ceniarth (UK)
- Mindi Chen, Associate, UBS (MA)
- Carrie Clougherty, CFA, Fixed Income Trader, Wellington Management (UK)
- Mitzi Madrid Diaz, Global Capital Markets Associate, Morgan Stanley (CA)
- Jessica Maienza, Renewable Energy Senior Financial Analyst, Amazon (WA)
- Leslie Montag, Senior Associate, Saints Capital (CA)
- Taylor Short, Leveraged Finance Associate, Morgan Stanley (NY)
- Lucy Sinicola, Associate, Vista Point Advisors (CA)
- Jennifer Faulk, Restaurant Investment Banking, Auspex Capital (CA)
- Katie Wong, Fixed Income Research Analyst, Fidelity (MA)







# WOMEN IN FINANCE

CAREER EDUCATION, NETWORKING,  
COMMUNITY BUILDING & SKILL DEVELOPMENT

## EXECUTIVE SPEAKER SERIES

- Janice Bourque, Managing Director, Hercules Capital
- Kate Crespo, Managing Director, FT Partners
- Dara Mitchell, Senior VP, Kadant Inc.

## COFFEE/MARKET CHATS

- Jacqueline Yang, Research Associate, Wellington Management
- Tiffany Chao, Finance Associate, Bain Capital Ventures
- Chau Hoang, Director, Valuation Consulting, BRG
- Maya Bechara, Financial Planning & Analysis Manager, SONOS
- Connie E, Private Capital Research Associate, Preqin
- Rohan Vankatesh, Associate, Gladstone Investment Corp.
- Emily Weis, Macro Strategist; Catherine Moore, FX Trader & Jillian Glover, AVP, Foreign Exchange Sales

## NETWORKING EVENTS

- NYC Alumnae Networking Event (Tapas in the E. Village)
  - 16 alumnae attended; ALL committed to serve as alumnae mentors
- NYC Mentorship Kick-Off
- Boston Holiday Alumnae Speed Networking Event
  - 20+ alumnae and 50+ students participated
- Spring Alumnae Happy Hour Zoom w/~20 alumnae

## COMMUNITY BUILDING/SERVICE

- Rosie's Place Homeless Shelter for Women
- Friendsgiving & Galentine's Day Potluck Dinners
- Pumpkin Painting Craft Project

## INDUSTRY PANELS/ROUNDTABLES

- Investment Banking: Olivia Caccia, Analyst, Raymond James; Emily Choi, Analyst, Morgan Stanley
- Investment Management: April Borawski, Junior Portfolio Manager, State Street; Jessica Borawski, Fixed Income Client Portfolio Analyst, Loomis Sales
- Private Equity with Providence Strategic Growth: Namrita Rai, Vice President; Samantha Tutelman, Analyst; Matt Saitta, Associate and Rachel Mack, Talent Manager

## SKILL DEVELOPMENT

- Advanced Excel Workshop w/Prof. Ghita Amor-Tijani (Computer Science Faculty)
- Public Speaking, Confidence & Your Professional Brand w/consultants Linda Ugelow & Megan Marini (collaboration with Women in Business)
- Empowering Women to Financially Thrive (collaboration w/THRIVE & Women in Business)
  - Jen Deng, VP, Finance & Strategy, State Street
  - Tara Falcone, CFP & Founder, ReisUP
  - Yanley Espinal, Director, Next Gen Personal Finance
  - Kelly Gushue, CEO & Founder, Personal Finance Warrior
- Wall Street Prep (WSP) Summer Series
  - 20 students in "entry-level" student-led cohort with focus on Excel, financial modeling & corporate finance
  - 10 students in "advanced" student-led cohort with focus on financial statement modeling, LBO modeling & M&A
- ~10 students attended Harvard Women in Business Conference







# WOMEN IN FINANCE

## NYC FRESHMEN TREK

In February 2020, WIF put 15 freshmen women on a bus to New York City to get early exposure to the finance industry - learning about various career paths through the professional journeys and personal stories from our alumni and other industry professionals at Bank of America, Goldman Sachs, Morgan Stanley, Point72, Third Point & NBCUniversal.



Students also had an opportunity to explore New York City (for many students, this was their first time). They visited the 9/11 Memorial & Museum and the Fearless Girl statue in front of the New York Stock Exchange.



Following a kick-off dinner with alumnae, students spent the next two busy days learning about investment banking, investment management, investment research, merchant banking, leveraged finance, capital markets, sales/trading, hedge funds and corporate finance. They learned about skills required to be successful and what a typical day might look like in each respective area. This allowed students to compare, contrast and evaluate where they may best see themselves one day.







# WOMEN IN FINANCE

## NYC FRESHMEN TREK

"I would say that the New York City Trek was definitely the highlight of my freshman year!"

- Lillian Moffett



"Before this trip, it'd been hard to picture what a career in finance could look like. However, through hearing about the career paths of individuals in various departments, I was able to visualize how careers in finance develop. Furthermore, I was able to identify what I can do as a student now to prepare myself for opportunities in the future. I left incredibly inspired and ready to delve into a career in finance. New York, I hope to see you again soon." - Mansi Sharma

"The New York City Trek gave me an idea of what is like to be a woman working in finance, and it has inspired me to pursue a career within the field." - Maddison Abundo







# WOMEN IN FINANCE

## ADVISORY BOARD



Katherine Hainsey (DMSB '08)  
Head of Digital Analytics  
JP Morgan Chase & Co.



Chau Hoang, CFA, ASA  
(DMSB '06)  
Director, BRG



Mary King (DMSB '19)  
Analyst, Backcast Partners  
Women in Finance Co-Founder



Adnrea Mascarenhas (DMSB '12)  
Alternatives Investment Specialist, DWS



Stefanie Raiola (DMSB '13)  
Senior Associate, Atairos



Sadaf Shekarkhand (DMSB '14)  
Associate, Client & Partner Group  
KKR



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VP, Cable Entertainment  
NBCUniversal



Heather Hauck (DMSB '99)  
D'Amore-McKim School of Business  
Northeastern University  
Women in Finance Director & Co-Founder



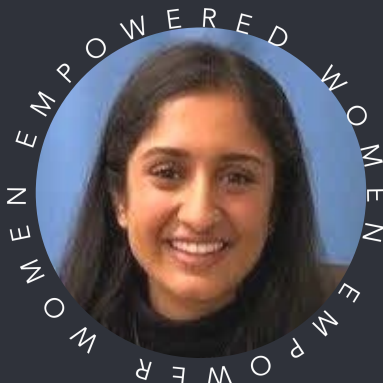


# WOMEN IN FINANCE

## SPRING 2020 STUDENT LEADERS



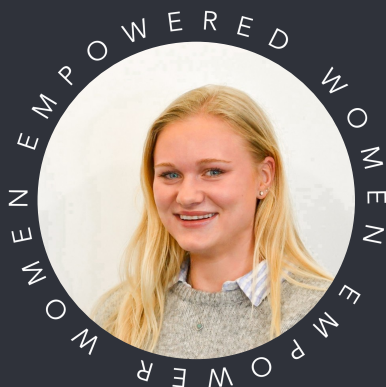
Tara Boyle (DMSB '20)  
Associate, Deal Advisory, PWC  
WIF President



Ramya Iyer (DMSB '20)  
VP Exec Speaker Series



Sydney Kimbrough (DMSB '22)  
VP Diversity & Inclusion



Kate Quigley  
(DMSB '22)  
VP Marketing



Miranda Nimmer  
(DMSB '21)  
Editor in Chief



Cynthia Mei (DMSB '19)  
Strategic Initiatives - Compliance &  
Operational Risk Control Analyst, UBS  
VP Mentorship



Christina Tarr  
(DMSB '21)  
AVP Mentorship



Bailey Coleman  
(DMSB '21)  
VP Events



Daniela Lacal  
(DMSB '20)  
VP NYC Trek



Kristine Aleksandrovica  
(DMSB '22)  
VP Coffee Chats



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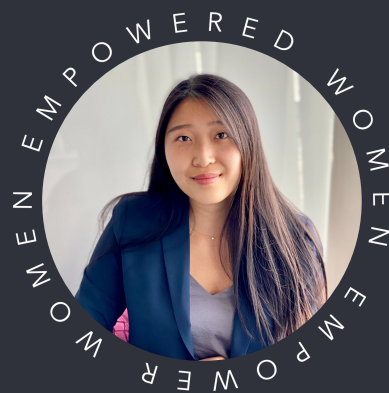
## FALL 2019 STUDENT LEADERS



Akhila Thota (DMSB '19)  
Analyst, Debt Capital Markets  
Scotiabank  
WIF President



Skyler Nasrallah (DMSB '19)  
Investment Banking Analyst,  
Scotiabank  
VP Exec. Speaker Series



Abby Jiang (DMSB '21)  
Treasurer



Ramya Iyer (DMSB '21)  
VP Alumni Outreach



Antara Nag-Chaudhuri  
(DMSB '22)  
VP Events



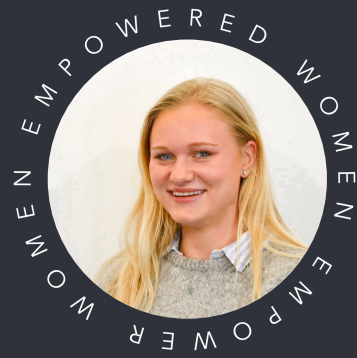
Justine Wilk (DMSB '20)  
Financial Analyst, Goldman Sachs  
VP Mentorship



Cynthia Mei (DMSB '19)  
Strategic Initiatives - Compliance &  
Operational Risk Control Analyst, UBS  
VP Mentorship



Sydney Kimbrough  
(DMSB '22)  
VP Diversity & Inclusion



Kate Quigley  
(DMSB '22)  
VP Marketing



Miranda Nimmer  
(DMSB '21)  
VP Newsletter



Miracle Olantuji  
(DMSB '21)  
VP Access & Opportunities