

# Tufts Financial Group

Fall 2023 General Interest Meeting

September 13th, 2023



# Our Mission

01

## Mentor

students interested in careers in financial services throughout the recruiting process

02

## Teach

principles of corporate finance through a bottom-up approach

03

## Connect

students with alumni in the Tufts Financial Network

# Meet the Executive Board



**Luca Broder**  
President  
Guggenheim Partners



**Andrew Dodson**  
Vice President  
Jefferies



**Chance Bootstaylor**  
Co-Portfolio Manager  
Holocene Advisors



**Cameron Cokinos**  
Co-Portfolio Manager  
Guggenheim Partners



**George Natsis**  
Co-Head of Education  
Moelis & Company



**Bart Codd**  
Co-Head of Education  
Solomon Partners



**Rebecca Lim**  
Co-Chief Marketing Officer  
Bank of America



**Kevin Golub**  
Co-Chief Marketing Officer  
LPL Financial



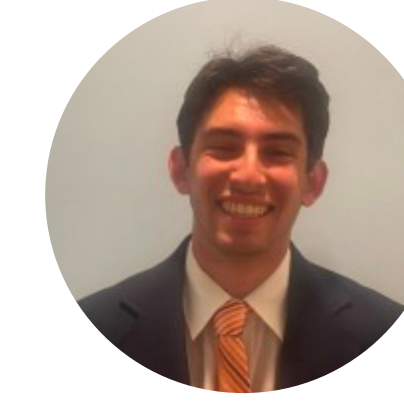
**Tammi Wang**  
Co-Head of Diversity  
Guggenheim Partners



**Emilia Rosinski**  
Co-Head of Diversity  
Centerview Partners



**Shashank Rao**  
Treasurer  
Guggenheim Partners



**Josh Ober**  
Chief Operating Officer  
NERA Economic Consulting

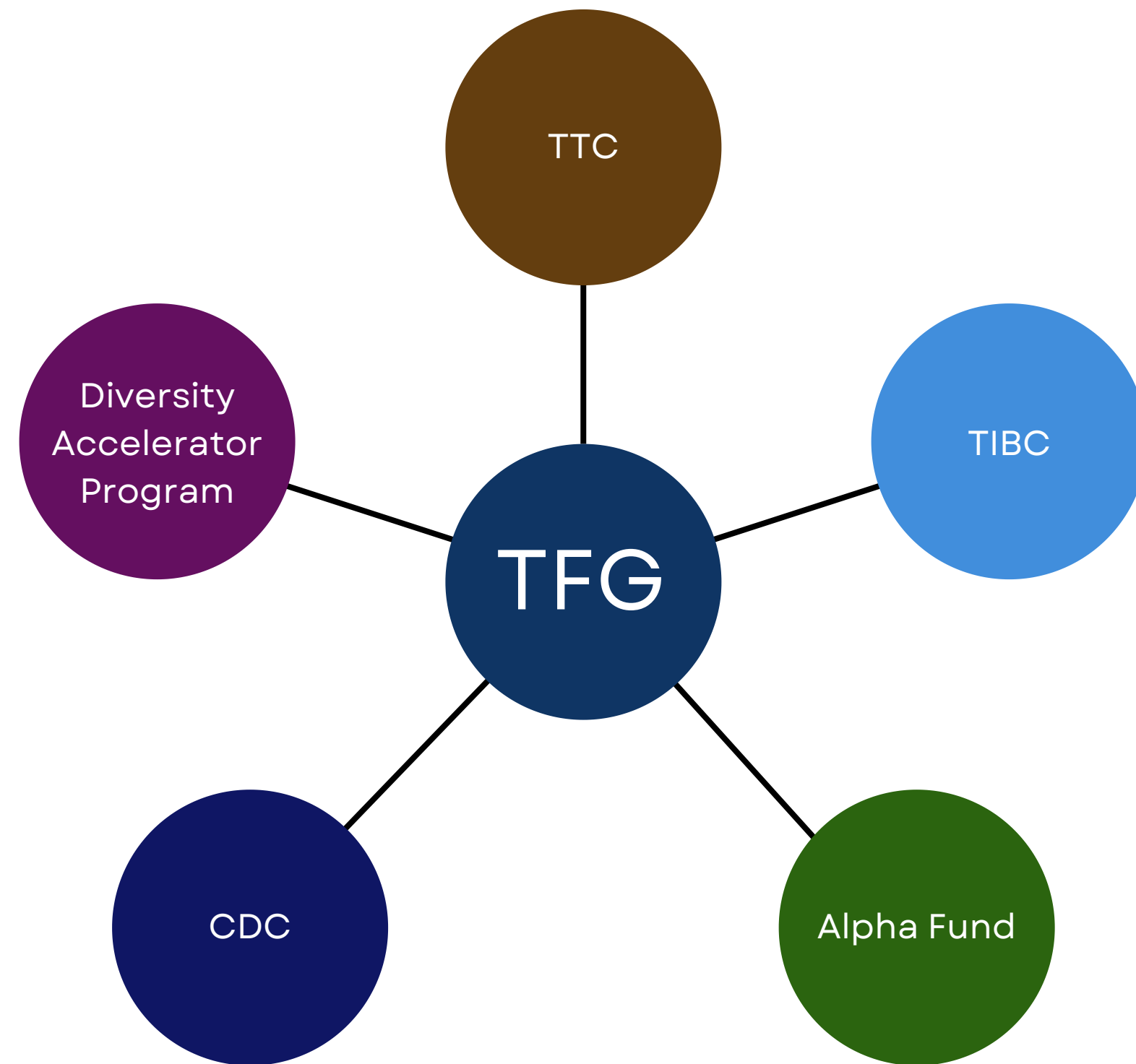


**Max Shellist**  
Co-Head of TTC  
DISC



**Josh Huang**  
Co-Head of TTC  
UConn

# Club Structure



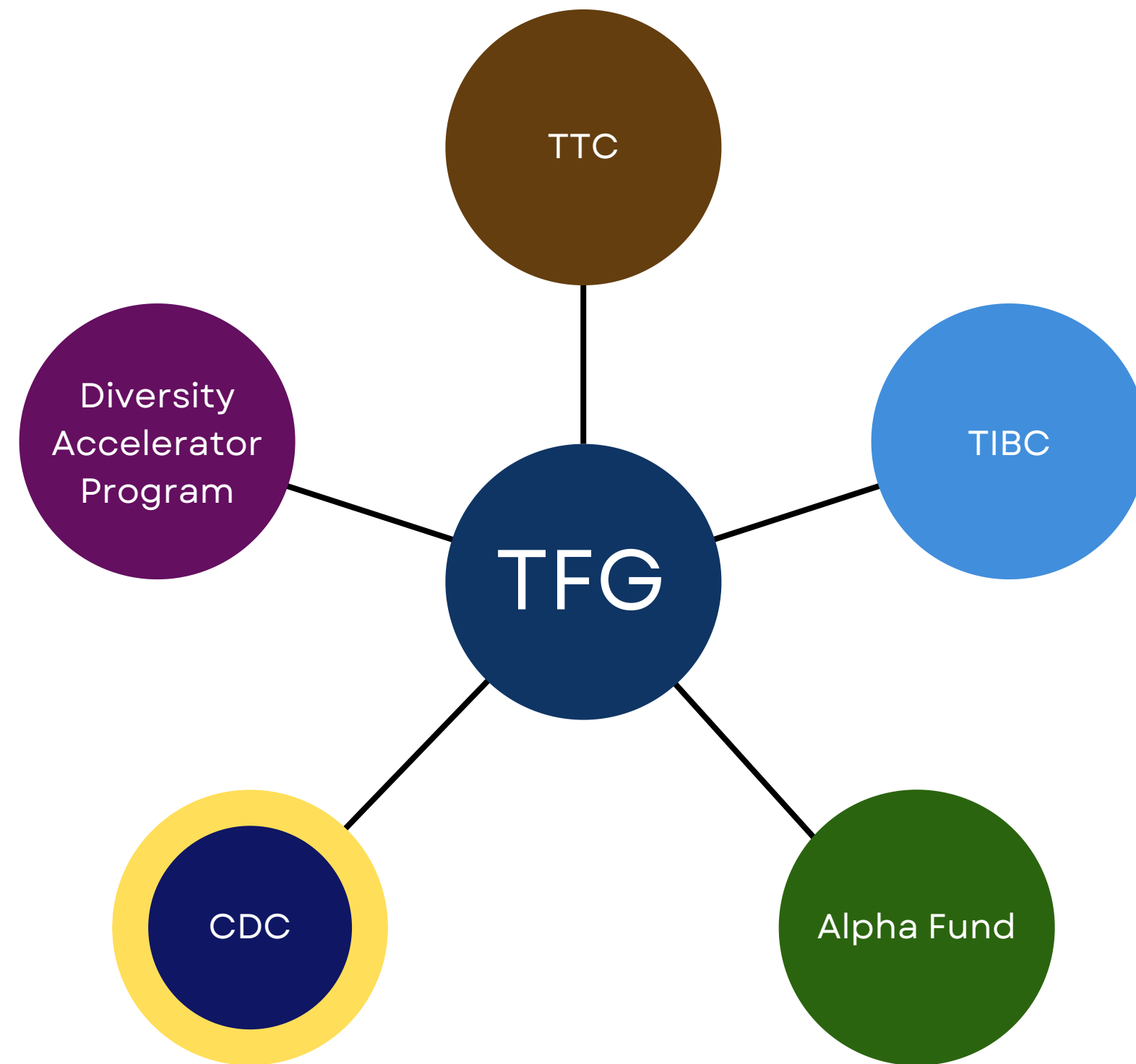


# Divisions of TFG





# Club Structure





# Career Development Team



**Bart Codd**  
Solomon Partners  
Bartholomew.Codd@tufts.edu



**George Natsis**  
Moelis & Co.  
George.Natsis@tufts.edu



**Jacob Messeri**  
Solomon Partners  
Jacob.Messeri@tufts.edu



**Ethan Raisner**  
Citibank  
Ethan.Raisner@tufts.edu



# Career Development Course (CDC)

Every Tuesday at 8pm in Cabot 206

01

Prepares you for a career in financial services

- What do the different roles do in finance (e.g. investment banker, salesperson, sell-side trader, hedge fund analyst, buy-side trader)?
- How do you write a resume/cover letter?
- How can you land a summer internship?

02

Pairs you with an **upperclassman mentor** who can help you through the recruiting process

03

Emphasizes small group with members of the career development team to provide more individualized recruiting guidance

04

Helps you decide on a specific sector (TIBC, TTC, Alpha Fund) based on your career interests

05

Hosts a **keynote speaker series** featuring distinguished industry alumni



# Career Development Course (CDC)

Every Tuesday at 8pm in Cabot 206

## Fall Semester

- Weekly teach-ins (career breakdowns, how to network, resume critiques, etc.)
- Mentorship program
- Speaker series

## Spring Semester

- Mentorship program (new mentors)
- Speaker series (cont'd)

**\*Strong participation in CDC will be viewed favorably when applying to other TFG sectors\***

# New York Trip

TFG hosts an application-based networking event that happens once per semester

- Travel to NY for a day and visit 2-3 banks
  - Opportunities to network with senior firm members and alumni
  - Speakers discuss their firm and business area(s)
- Students of all class years are encouraged to apply



# New York Trip

Interested in the upcoming NY Trip? Use the link in our Instagram (@tuftsfinancialgroup) bio to apply.



NY Trip Spring 2023

## Details for the Fall 2023 NY Trip:

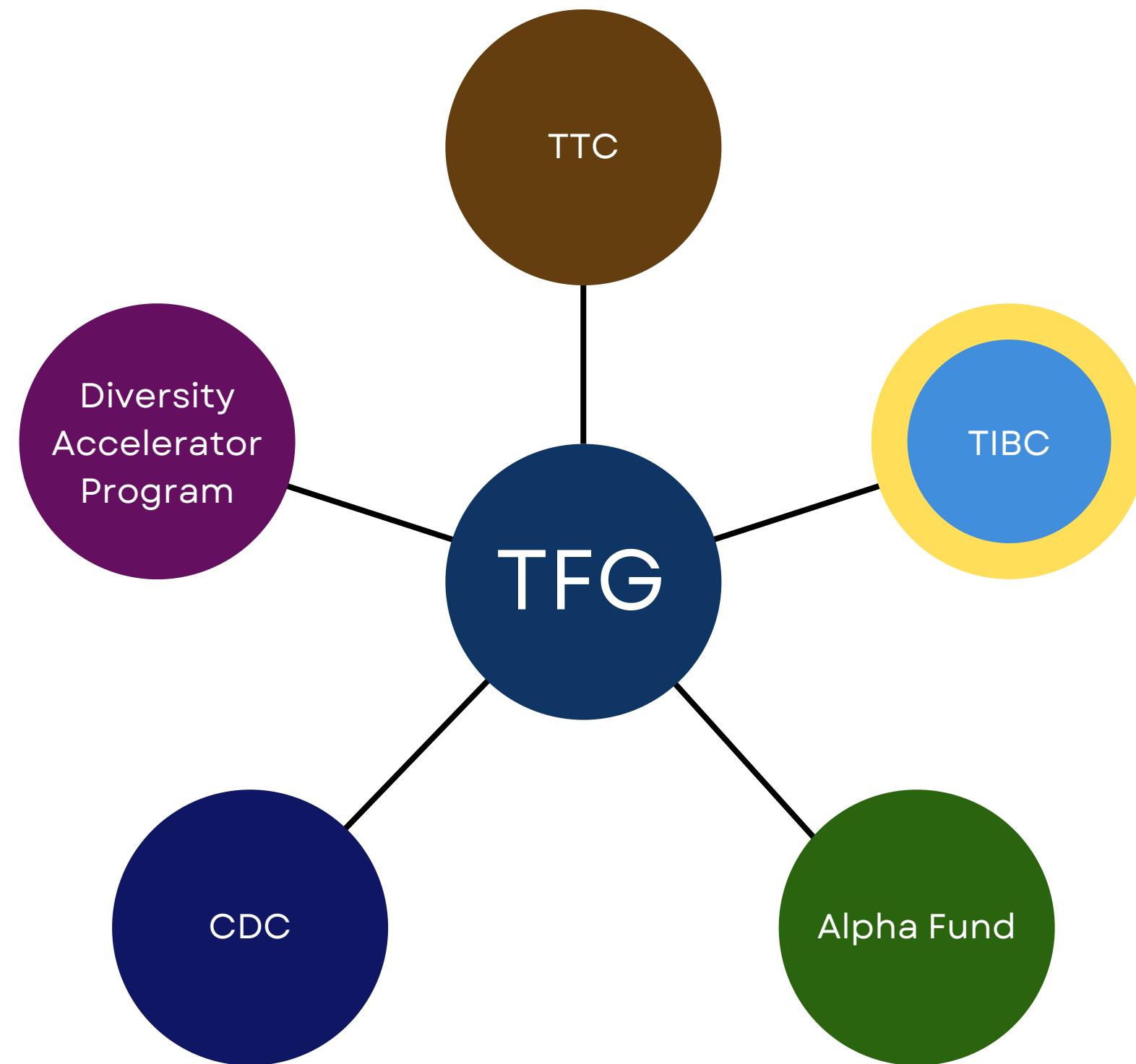
**Date:** October 19th

### Firms We're Visiting:

Moelis & Co.  
Nomura

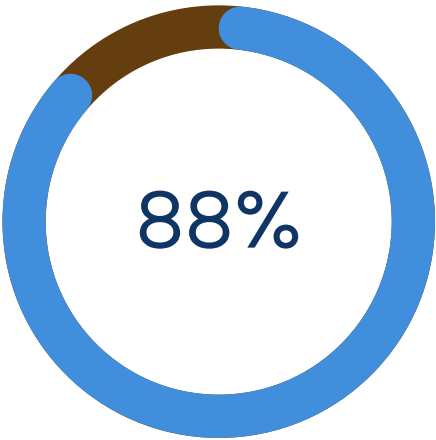
More information to follow

# Club Structure

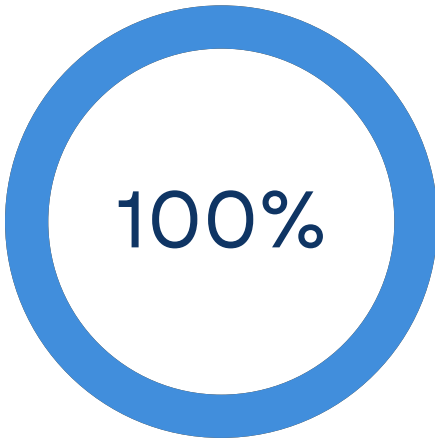




# Tufts Investment Banking Club (TIBC)



of members  
have signed  
junior year IB  
offers



of TIBC members  
have signed  
sophomore  
offers



Average GPA



# Tufts Investment Banking Club (TIBC)

M for Freshmen at 8pm in Cabot 206; M&W for Sophomores at 9pm in Braker 001

## Freshmen

### Fall Semester:

- Investment Banking Crash Course
- Open to all
- 6 meetings total, once per week
- Networking/guest speaker opportunities
- First Meeting Date: October 2023

### Spring Semester:

- Preparation for summer 2024 internships; application based
- Begin IB recruitment prep

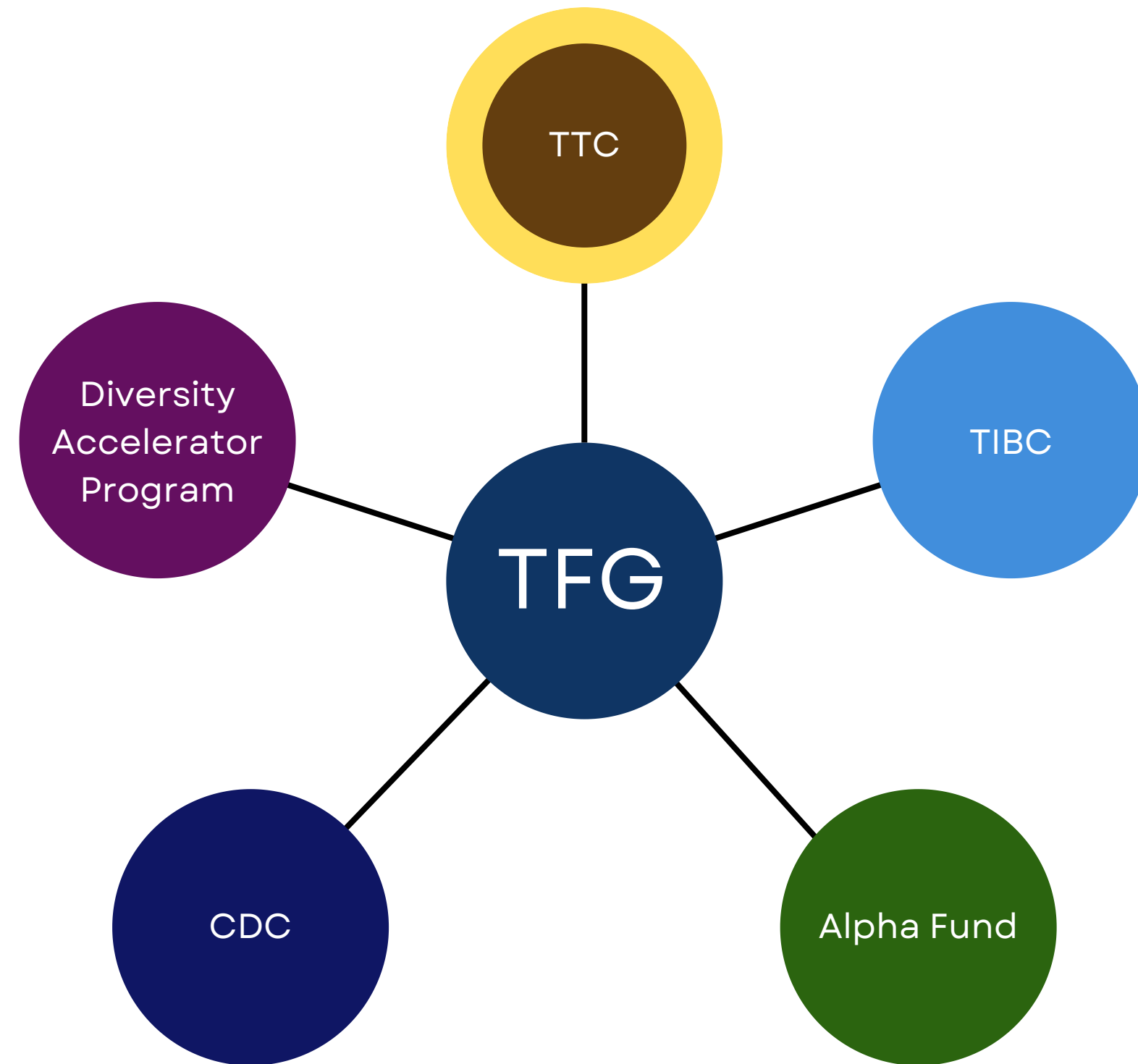
## Sophomores

### Full year:

- Meetings twice per week
- Mentorship and rigorous training in accounting, valuation, M&A, behavioral, and networking concepts required for the IB recruitment process
- Access to TIBC's growing network of alumni
- Resume review and cover letter writing
- Mock interviews



# Club Structure



# Tufts Trading Club (TTC)



**Josh Huang**  
Joshua.Huang@tufts.edu



**Max Shellist**  
Maxwell.Shellist@tufts.edu



# Tufts Trading Club (TTC)

Every Wednesday at 7:30pm in Barnum 208

01

Learn the main asset classes and their markets for students interested in S&T and quantitative trading

02

Prepare for S&T and Quant Trading interviews

- How do you answer logic and probability questions?
- How do you answer markets-based questions?
- How do you solve algorithmic coding questions?

03

Learn the basics of options theory and no-arbitrage options pricing using put-call parity

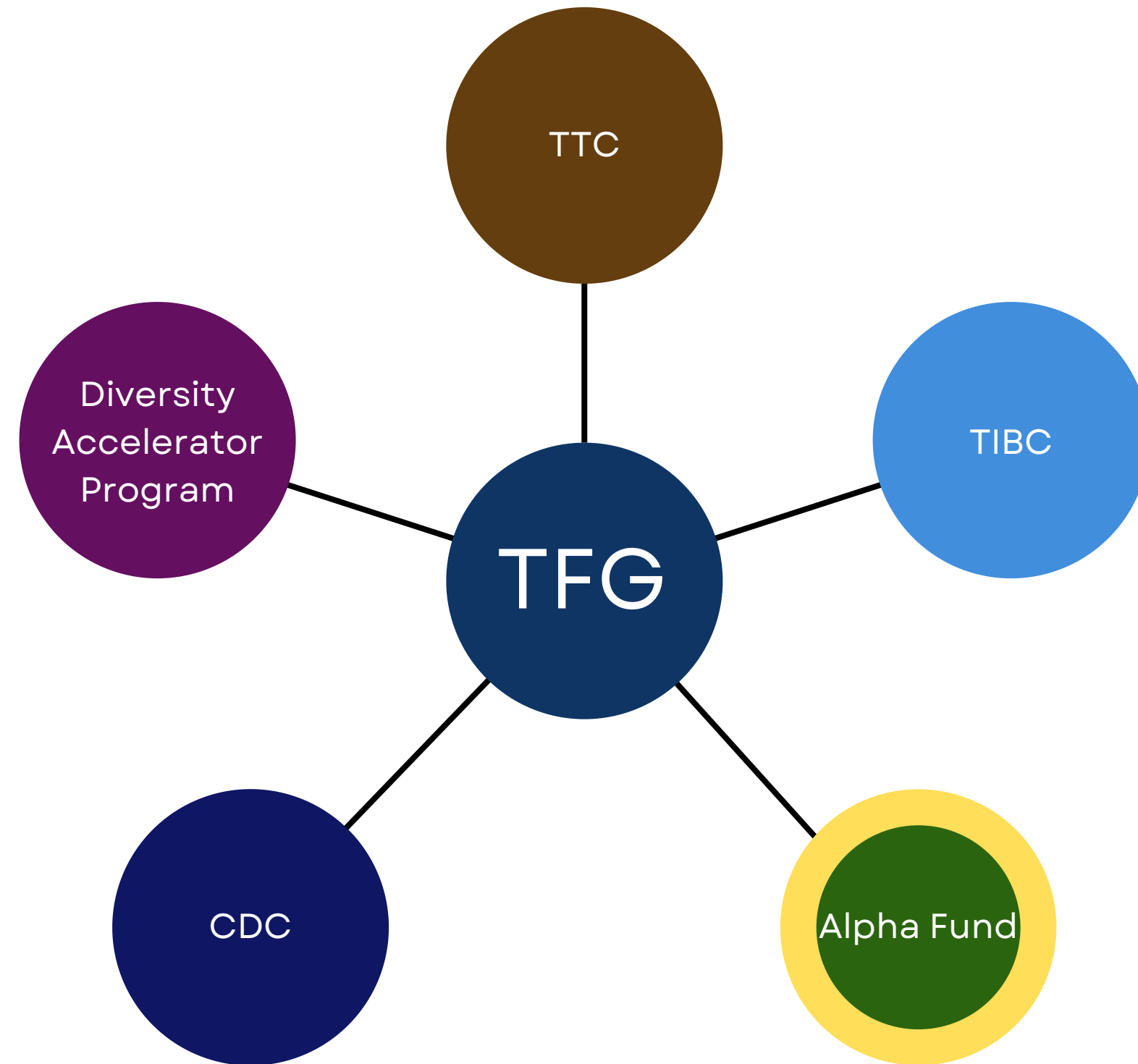
04

Understand the importance of game theory and decision making in trading through games like Poker and Chess

05

Hosts guest speakers featuring distinguished industry alumni

# Club Structure





# Tufts Alpha Fund



**Chance Bootstaylor**  
Holocene Advisors  
[Chance.Bootstaylor@tufts.edu](mailto:Chance.Bootstaylor@tufts.edu)



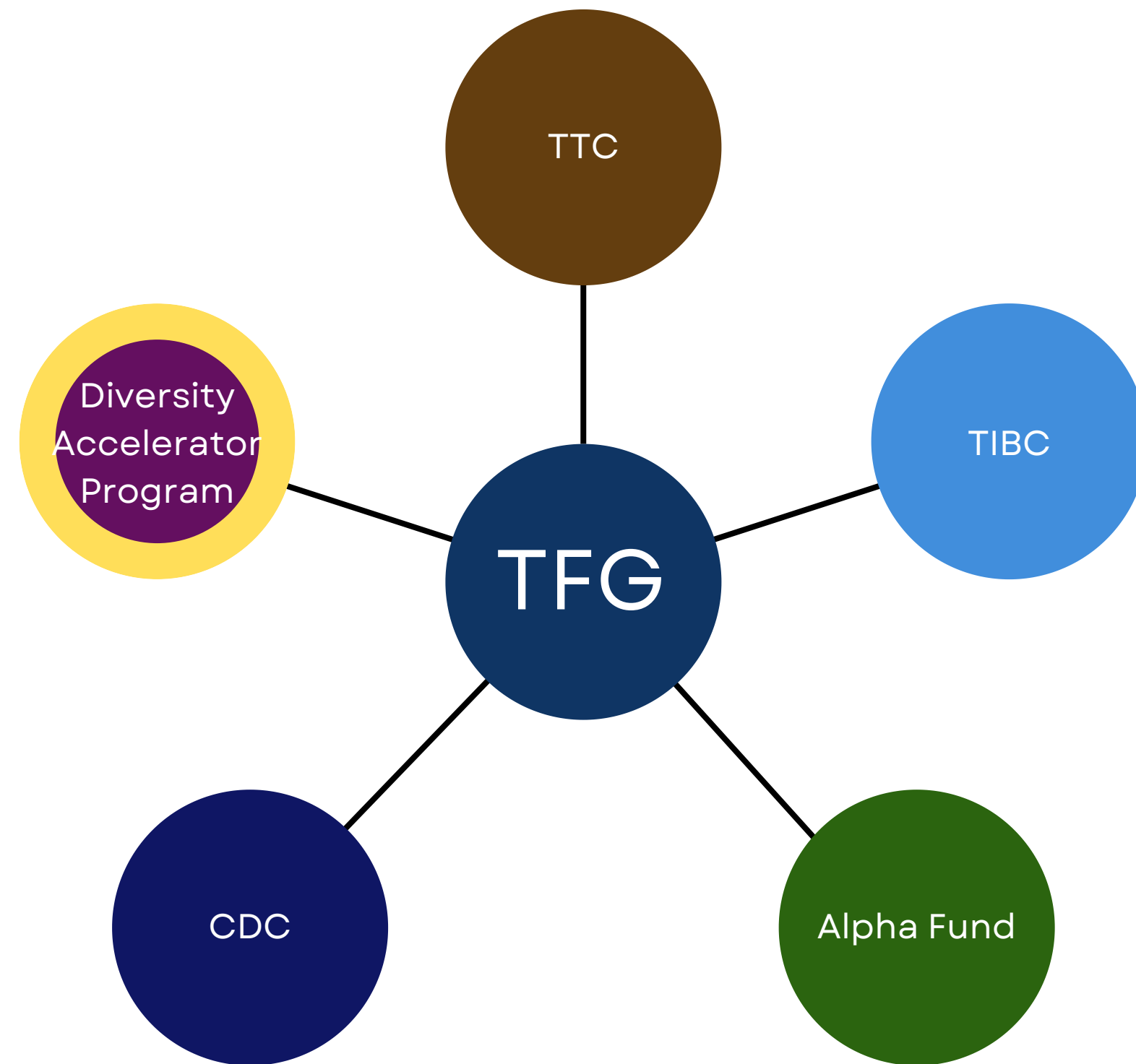
**Cameron Cokinos**  
Guggenheim Partners  
[Cameron.Cokinos@tufts.edu](mailto:Cameron.Cokinos@tufts.edu)

# Tufts Alpha Fund

The Alpha Fund is a concentrated, long-only global equities portfolio of ~\$310k managed by ~15 students

- Conduct equity research to pitch new positions, manage existing positions, and discuss recent market developments
- For students who have learned the basics of financial modeling and valuation and are interested in public markets investing. Students may apply by presenting a value-oriented stock pitch demonstrating knowledge of valuation and business models
- 4-5 hours per week (meetings at 9pm on Sundays and one pitch per semester from each member)

# Club Structure





# Diversity Accelerator Program



**Emilia Rosinski**  
Centerview Partners  
Emilia.Rosinski@tufts.edu



**Tammi Wang**  
Guggenheim Partners  
Tammi.Wang@tufts.edu



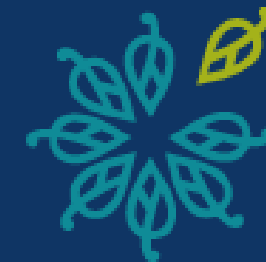
**Nana Adjekum**  
HSBC  
Nana.Adjekum@tufts.edu

# Diversity Accelerator Program

The TFG Diversity Accelerator Program includes:

- Weekly meetings regarding diversity programs, interviewing, and preparing cover letters & applications
- Panel events featuring Tufts alumni from variety of backgrounds
- Onsite firm visits in Boston and NYC hosted by successful alumni for networking opportunities
- Guidance on applying for finance mentorship organizations such as Forté Foundation, SEO, ibRecruit, Girls Who Invest, & BLK Capital Management.
- Involvement in the diversity accelerator program is a great way to navigate the accelerated diversity recruitment and secure a job in finance early

SEO



Forté  
FOUNDATION

girls who  
invest®



# Mentorship Program





# Mentorship Program

Students in the TFG mentorship program are assigned an upperclassman mentor to guide you and get to know you on a more personal level

- Program available to all members of TFG regardless of sector
- Strongly recommended for all first-years and sophomores. Scan the QR code at the end of the presentation to sign up.
- Be on the lookout for “Meet Exec Packets” to express interest in a specific upperclassmen mentor
  - Indicate your interest on the attendance form

# The Big Picture



# Typical Club Progression

## First-Year

**First Semester:** Learn the different jobs within the finance industry through the CDC. Learn the fundamentals of valuation through TIBC's crash course

**Second Semester:** If you haven't already, join a sector (TTC, TIBC, Alpha Fund, etc.). Begin networking.

## Sophomore

**Networking, Applying, & Interview Prep:** Make connections with alumni and apply to junior summer internships in the fall/winter/spring.

## Junior

**Keep Recruiting:** Lock down a junior summer internship.

## Senior

**Mentoring:** Leadership roles help teach first-years or advise sophomores entering the recruiting cycle.



# Contact Us



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tuftsfinancialgroup.org



@tuftsfinancialgroup

