



Tufts Financial Group

Spring 2024 GIM

MENTOR

students interested in careers in financial services throughout the recruiting process

TEACH

principles of corporate finance through a bottom-up approach

CONNECT

students with alumni in the Tufts Financial Network

MEET THE EXECUTIVE BOARD



Andrew Dodson
President



Renee Shah
Vice President



Chance Bootstaylor
Co-PM



Cam Cokinos
Co-PM



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Co-Head of Ed



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Co-CMO



Kirsten Whyte
Co-CMO



Nana Adjekum
Head of DAP



Max Shellist
Co-Head of TTC



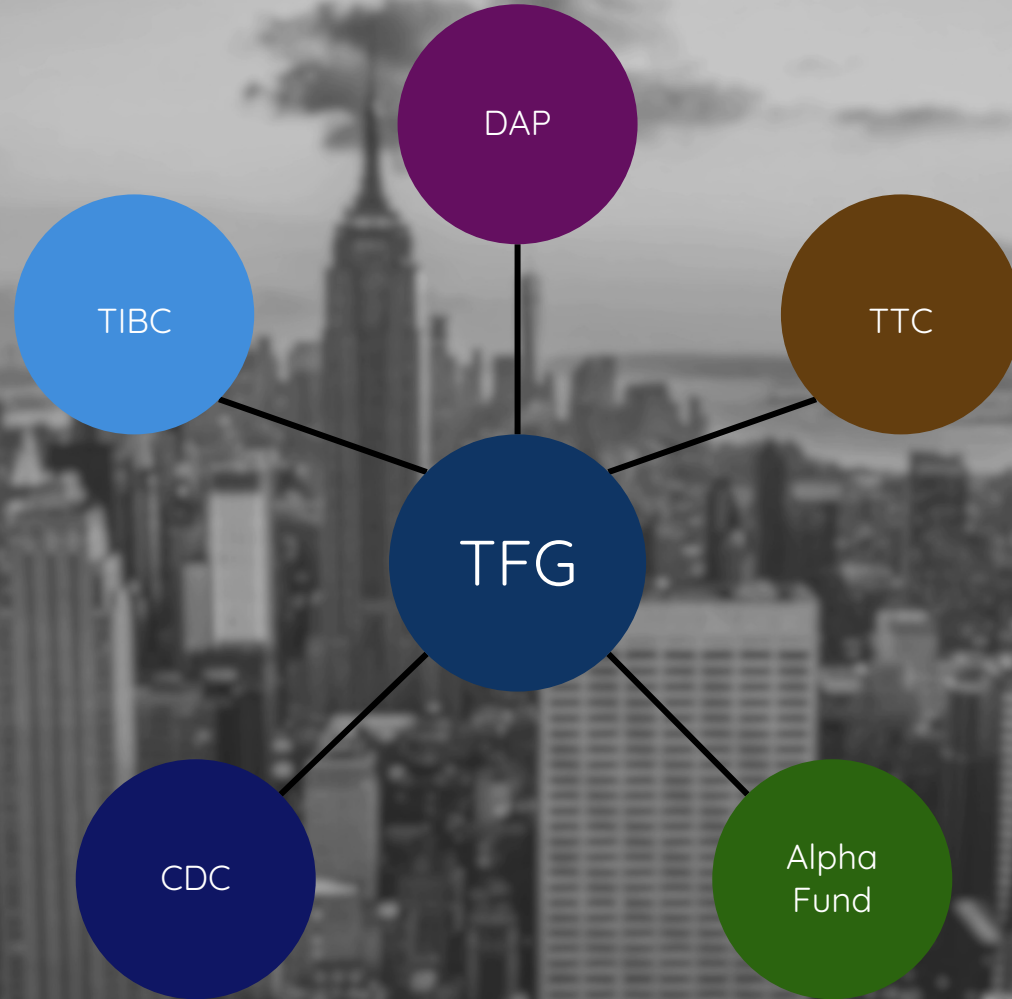
Irene Zhang
Co-Head of TTC



Ben Ribicoff
Chief Operating Officer

Senior Advisor: Luca Broder; **CDC Senior Advisors:** Bart Codd & George Natsis;
Marketing Senior Advisors: Rebecca Lim & Kevin Golub; **DAP Senior Advisors:** Emilia Rosinski & Tammi Wang

CLUB STRUCTURE



Divisions of TFG

CAREER DEVELOPMENT TEAM



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Patrick Fanning
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1

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?

2

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

3

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

4

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

5

Hosts a keynote speaker series featuring distinguished industry alumni

CAREER DEVELOPMENT COURSE

Every Tuesday at 8pm in Cabot 206

Spring Semester

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

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



NY TRIP

- Travel to NY for a day and visit 4 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

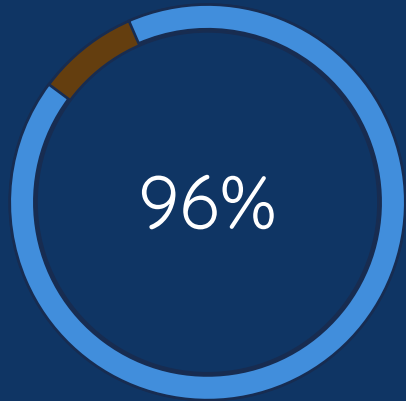
Interested in the upcoming NY Trip?

- Submit your interest using the link in our Insta bio (see QR code at end of slideshow)
- **March 7th**
 - Guggenheim
 - PJT Partners
 - Lazard
 - Others to be announced soon
- Visit the TFG website to learn more!
- Keep an eye out for the formal application.

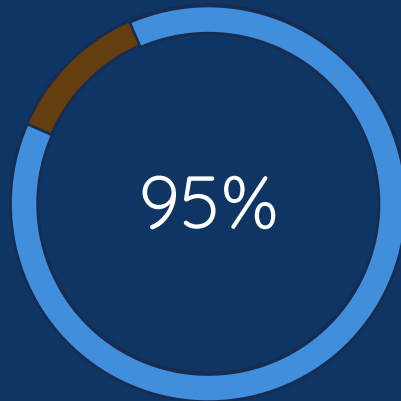
NY Trip



Tufts Investment Banking Club (TIBC)



of members
have signed
junior year IB
offers



Of members
received full-
time return
offers



Average GPA

 **BARCLAYS**

Blackstone

CENTER | VIEW PARTNERS

 **citibank**

EVERCORE

**Goldman
Sachs**

GUGGENHEIM

Jefferies

JPMORGAN CHASE & CO.

KKR

LAZARD

MOELIS & COMPANY

Morgan Stanley

PIPER | SANDLER

P/W/P
PERELLA WEINBERG
PARTNERS

Tufts Investment Banking Club (TIBC)

Freshmen Year

Fall: Freshman Crash Course

- Open to all first-years
- Covers industry basics
- Introduction to investment banking

Spring: Freshman Accelerator

- **Application based**
- Two weekly meetings
- Increased mentorship
- Focus on technical knowledge

Sophomore Year

Full Year: Sophomore Cohort

- **Application based**
- 2 weekly meetings on Mondays and Wednesdays from 9-10pm
- Rigorous technical instruction in accounting, valuation, and M&A
- Continued mentorship and focus on collaboration
- Interview and networking preparation
- Regular assignments, quizzes, case studies included in curriculum

TUFTS TRADING CLUB



Max Shellist
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Irene Zhang
Yiran.Zhang@tufts.edu

1

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

2

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?

3

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

4

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

5

Hosts guest speakers featuring distinguished industry alumni

ALPHA FUND



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Chance Bootstaylor
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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)

DIVERSITY ACCELERATOR PROGRAM



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Anuhea Elliott
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Noah Masozera
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1

Weekly meetings regarding diversity programs, interviewing, and preparing cover letters & applications

2

Panel events featuring Tufts alumni from variety of backgrounds

3

Onsite firm visits in Boston and NYC hosted by successful alumni for networking opportunities

4

Guidance on applying for finance mentorship organizations such as Forté Foundation, SEO, ibRecruit, Girls Who Invest, & BLK Capital Management.

5

Involvement in the diversity accelerator program is a great way to navigate the accelerated diversity recruitment and secure a job in finance early



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

More information about the Mentorship Program will follow. Check your email!

Mentorship



Big Picture

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.

EMAIL

tufts.invest@gmail.com

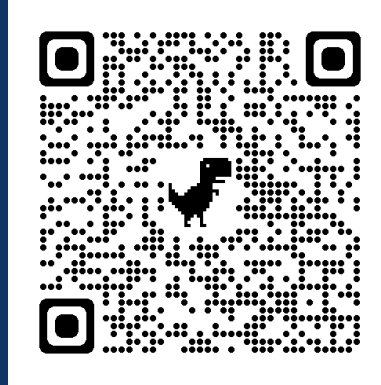
WEBSITE

tuftsfinancialgroup.org

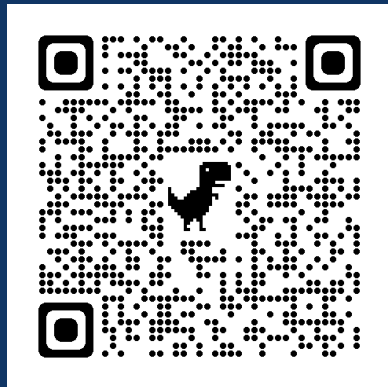
INSTAGRAM

[@tuftsfinancialgroup](https://www.instagram.com/tuftsfinancialgroup)

Attendance



NY Trip



Mentorship

