ASSET MANAGEMENT LAB

AN EXPERIENTIAL LEARNING COURSE

(FINC 910)

FACULTY ADVISOR: PHIL ORDWAY

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ASSET MANAGEMENT LAB

• A QUARTER-LONG INTERNSHIP WITH A LOCAL, NATIONAL, OR INTERNATIONAL INVESTMENT MANAGEMENT FIRM.

• MORE THAN 125 POTENTIAL SPONSOR FIRMS:
  • ENDOWMENTS & FOUNDATIONS
  • DIVERSIFIED ASSET MANAGERS
  • PENSIONS
  • HEDGE FUNDS & MUTUAL FUNDS
  • FAMILY OFFICES
  • OTHERS
CAREER DEVELOPMENT

• ASSET MANAGEMENT IS A FOUNDATIONAL SKILL REQUIRED BY:
  • SENIOR EXECUTIVES
  • DIRECTORS/BOARD MEMBERS OF ALL ORGANIZATIONS
  • ENTREPRENEURS
  • INDIVIDUAL INVESTMENT/RETIREMENT PORTFOLIOS
  • M&A, CONSULTING, PRIVATE EQUITY, FP&A, ETC.

NOT *JUST* A TRAINING GROUND FOR FUTURE ANALYSTS & PORTFOLIO MANAGERS
CAREER DEVELOPMENT

• ASSET MANAGEMENT CAN BE A DIFFERENCE-MAKER IN
  • INTERVIEWING
  • RESPONSIBILITY AND PROMOTIONS
  • COMPETITIVE DIFFERENTIATION
FLEXIBILITY

• FIND YOUR OWN SPONSOR FIRM OR MATCH WITHIN NETWORK

• DESIGN YOUR OWN PROJECT OR RECEIVE ASSIGNMENT FROM SPONSOR FIRM

• TIME/GEOGRAPHY CONSTRAINTS ARE MINIMAL
  
  ○ STUDENTS HAVE WORKED ACROSS CONTINENTS/TIME ZONES; WORK DONE ON SCHEDULES TO ACCOMMODATE THE STUDENT AND FIRMS’ AVAILABILITY
APPLICATION PROCESS

• WRITTEN APPLICATION TO FACULTY ADVISOR
• STUDENT-LEAD MATCHING PROCESS FACILITATED BY FACULTY ADVISOR
• TWO-WAY FIT WITH SPONSOR FIRM
• QUARTER-LONG PROJECT
• OPPORTUNITY FOR EXTENSION OF PROJECT, JOB OFFERS, NETWORKING, INDEPENDENT STUDY, ETC.

CAREER SWITCHERS WELCOME (SUBJECT TO PREREQGS)
GOAL

AN EXPERIENCE DEEMED VALUABLE BY BOTH STUDENT AND SPONSOR FIRM

• GRADING:
  • 85% FEEDBACK FROM SPONSOR FIRM
  • 15% FINAL PROJECT AND PARTICIPATION
LOGISTICS

• ~10-20 HOURS PER WEEK (HIGH WEEK-TO-WEEK VARIABILITY)
• PROFESSIONALISM EXPECTED AT ALL TIMES
• OPEN LINES OF COMMUNICATION BETWEEN STUDENT, SPONSOR FIRM, AND FACULTY ADVISOR
• PRE-, MID-, & POST-TERM 1X1 MEETINGS W/ FACULTY ADVISOR
• WEEKLY (12:00 WEDNESDAY) SEMINAR
• AD HOC SESSIONS TO COVER TOPICS OF INTEREST: CREDIT ANALYSIS, PRIMARY RESEARCH, BLOOMBERG, ETC.
LOGISTICS

• The Asset Management Lab is offered only once per year in the Spring Quarter
• The lab is a complement to Practicum, other courses
• 1st Year vs. 2nd Year / 1Y / JD-MDA / E&W
• Recruiting
QUESTIONS?

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