

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 PREREQS)

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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