



# Finance Option Info Session

November 8, 2023

**UBC SAUDER**  
SCHOOL OF BUSINESS

# Land acknowledgment

## UBC Point Grey Campus (Vancouver)

The land on which the campus is located is the traditional, ancestral, and unceded territory of the xwməθkwəy̓əm (Musqueam) People.



# Agenda

- **Why considering finance**  
Jan Bena
- **Sauder's finance curriculum**  
Jan Bena
- **Diversity of opportunity and demand for diversity in finance**  
Pennie George
- **Importance of experiential learning, PMF, SWIFT**  
Pennie George
- **Sauder's BCC services and programming, FMP, CMTP**  
Michael Clarke, Misa Zhang
- **Student panel**  
Toluwani Adekeye  
Danelle Anderson  
Jordan Black  
Mahak Brar  
Caleigh Kuramoto  
Chloe Yip
- **Q&A and networking**

# Sauder UGO and BCC presenters



**Scott Entwistle**

Academic Advisor, UGO



**Michael Clarke**

Associate Director, BCom Careers and  
Work Integrated Learning, BCC



**Misa Zhang**

Career Strategist, BCom Careers, BCC

# Finance Faculty Presenters



**Isha Agarwal**

Assistant Professor  
MA (Cornell)  
PhD Economics (Cornell)



**Jan Bena**

Associate Professor  
Finance Division Chair  
PhD Finance (LSE)  
PhD Economics (CERGE-EI)



**Pennie George**

Adjunct Professor  
Managing Director, PMF  
Program Director, UBC SWIFT



**Ella D.S. Patelli**

Assistant Professor  
MA Economics (University of Geneva)  
PhD Finance (HEC Montreal)



**Bill Tilford**

Adjunct Professor  
Advanced Topics in Investment  
Management Course Lead

# Why you should be thinking about finance

- **The importance of capital markets and finance in the society continues to increase.**
- Finance professionals and institutions are assuming broader societal roles through initiatives such as impact investing and climate finance.
- The path to finance careers requires strong academics coupled with experiential learning.
- UBC Sauder excels in both.
- Together, we have organized this event to highlight the **Finance Option at Sauder** as a pathway into the finance industry.
- **Finance industry offers abundant opportunities. It is crucial to make well-informed choices regarding your career path.**

# Why Career in Finance?

- **Dynamic and innovative industry with a consistent high demand for graduates**
- **Offers stimulating and exciting job opportunities**
- **Rapid career progression compared to other sectors**
- **Defined pathways for advancement with ample opportunities for growth and excellence**
- **Diverse career paths available to cater to different individual preferences**
- **Global work opportunities**
- **Abundant exit opportunities if you choose to transition out of finance**



# Finance Careers

## Traditional Areas

- Money Management
- Investment Banking
- Corporate Finance
- Commercial Banking
- Central Banking, Regulation, and Compliance
- Research

## Rapidly Advancing Areas

- Venture Capital
- Private Equity
- FinTech
- Big Data and Digitalization in Finance with AI Integration
- Impact Investing
- Climate Finance
- Financial Forensics



# UBC Sauder's finance curriculum



# Three Pillars of Finance Curriculum at UBC Sauder

1

We are committed to excellence in finance education, fostering **skills and expertise that support ongoing career growth and lasting professional success**

2

We believe that **blending rigorous academics with practical business experience** leads to unparalleled student learning

3

We lead the way in integrating rigor, respect, and responsibility into business education. Our values encompass **curiosity, open-mindedness, ethical conduct, dedication, and humility**

# Finance Option Required Courses

- **COMM 370 - Corporate Finance**
  - Financial analysis and planning
  - Capital budgeting, cost of capital, capital raising
  - Corporate governance
- **COMM 371 - Investment Theory**
  - Pricing of securities: bonds, stocks, derivatives
  - Investment management
- **COMM 374 - Applied Financial Markets**
  - Practical applications: Making informed investment and corporate finance decisions based on facts and data-driven analysis

# Elective Courses offered by UBC Sauder Finance Division

- Financial Institutions\*
- M&A
- Venture Capital
- Entrepreneurial Finance and Private Equity\*
- FinTech\*
- Behavioral Finance\*
- Project Finance\*
- Personal Finance\*
- Introduction to Capital Markets
- International Finance
- Investment Policy
- Advanced Topics in Investment Management\*
- Fixed Income Markets and Management
- Advanced Topics in Corporate Finance
- Risk Management and Financial Engineering\*

\* Indicates new or recently renewed courses. Finance Option requires at least 6 credits.

**Finance is  
a world  
of opportunity**



## Myths

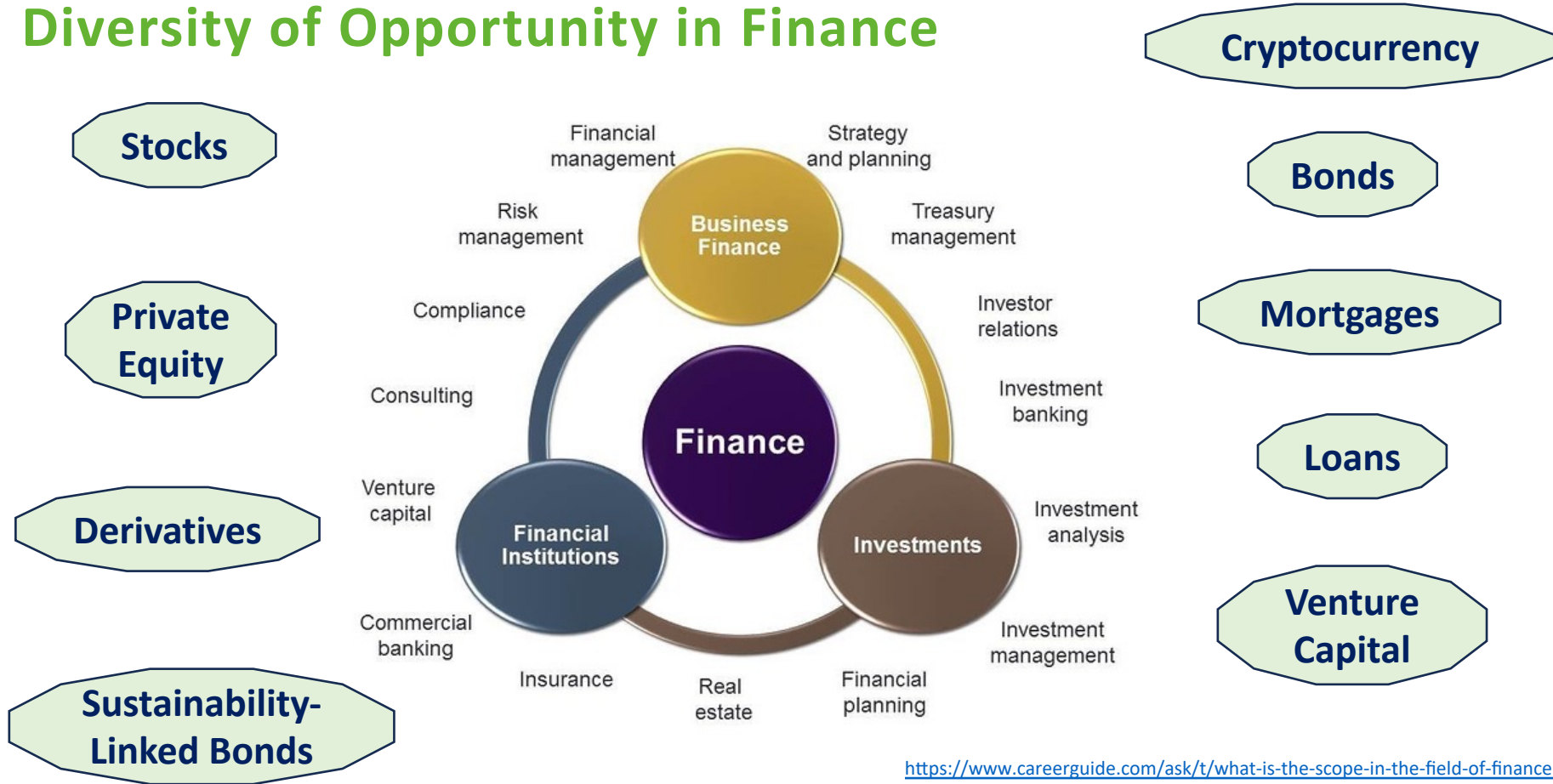
- Great for introverts with no people skills
- Vicious climb to the top
- Dominated by greed
- Toxic work environment

- Passion for finance can develop anytime by learning finance basics and building on that knowledge

## Facts

- Both analytical and communication skills are required
- Success comes from hard work and strong relationships
- Dominated by results-oriented people
- Finance has changed and is changing

# Diversity of Opportunity in Finance





# Demand for Diversity in Industry

Fintech

Congratulations to the inaugural UBC SWIFT 2023 Cohort!



UBC SAUDER  
SCHOOL OF BUSINESS

Behavioural  
Finance



RBC Pathways  
Diversity Award  
Program 2023

Decentralized  
Finance



Socially  
Responsible  
Investing



Live forever  
proud.

All year round, we embrace  
and support diversity and  
inclusion. That's why our Pride  
symbol is a full circle rainbow.



ICON  
TALENT  
PARTNERS

ICON  
FELLOWSHIP  
PROGRAM  
2023 - 2024



ESG

Climate  
Finance

**UBC Sauder's Finance Division  
is a world-class provider  
of experiential learning**



# Importance of Experiential Learning as a complement to Finance curriculum

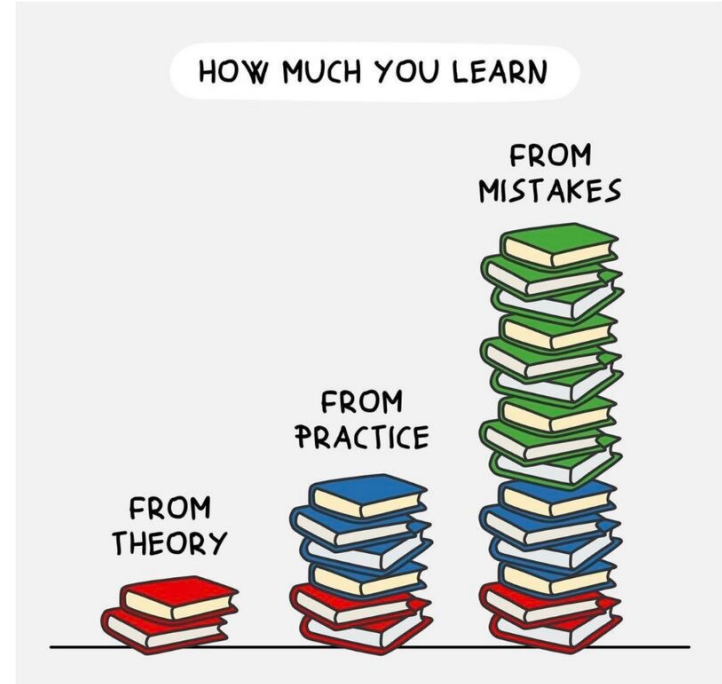
**Learning by doing:** Students connect theory & knowledge learned in the classroom to real-world situations.

## Key Features:

- Initiative, decision-making, accountability
- Experimentation and problem-solving
- Ex-post analysis and self-reflection

## Key benefits:

- A better understanding of course material
- Insight about themselves
- Diversity of experience
- Professional development
- Self-confidence and leadership



# Experiential Learning Programs Offered by Finance Division Faculty

- **UBC Portfolio Management Foundation (PMF)**
  - 2.5 yr commitment to collaboratively manage \$10 million
  - Access to mentors, workshops, and summer internship
  - 7-9 students selected per year, typically during Year 2
  - Class of 2026 will be admitted in January 2024
- **UBC SWIFT: Sauder Women+ in Finance Training**
  - 1 yr rolling commitment to train a more inclusive pipeline of talent
  - Access to mentors, workshops, and summer internship
  - 8-10 students selected per year, from Years 1, 2, or 3

# Term 1 Events Hosted by SWIFT & PMF

**Discovering Finance Panel: From BCom to Capital Markets**  
Oct 16, 2023 at 3:30pm

**Working in the Capital Markets: Myth vs Fact**  
Oct 26, 2023 at 12:30pm

**Investment Analyst Training with Point72 Academy**  
Nov 6, 2023 at 3:30pm

**Portfolio Management Foundation – Pre-application Info Session**  
Nov 16, 2023 at 12:30pm

**Sauder Women+ in Finance Training – Pre-application Info Session**  
Nov 23, 2023 at 12:30pm

\* Events located at HA 491, no registration required

Self-enroll

UBC SWIFT

Winter 2023/24

on Canvas



Up next

Don't Miss

# PMF & SWIFT Timelines

- Key dates for students are posted on the PMF & SWIFT websites
- Applications open on Dec 15
- Applications close in January

<http://www.sauder.ubc.ca/pmf>

<http://www.sauder.ubc.ca/swift>

Oct-Dec 2023

Attend monthly workshops about capital markets careers; open to all Sauder students. Join the 'UBC SWIFT (Winter 2023/24)' community on Canvas to learn more about finance, and start training & networking.

November 2023

Attend a SWIFT pre-application information session

December 2023

Enroll in the 'UBC SWIFT (Winter 2023/24)' group on Canvas to access the SWIFT application form. Requirements will include resume, transcript, personal paragraph, video submission, and instructor information.

January 2024

Application deadline, interviews & group activity, admission offers.

Feb-Apr 2024

SWIFT training and professional development. Attention to reconciling classroom theory with practice; developing fluency in financial markets, financial statements, and financial modelling.

**Hari B. Varshney**

**Business Career Centre**



# Career services designed for UBC Sauder students

- Self-serve career development resources on COOL (Working in Finance document, resume, cover letter, interview toolkits and more!)
- One-on-one coaching & advising appointments with a Career Strategist
- Career Peer Advising appointments and Drop-In sessions
- UBC Sauder Co-op program
- Industry events & workshops (Agentis Capital, TD Securities, and RBC Commercial Banking on campus soon!)
- Mentorship & Specialty Programs (Finance Mentorship Program and Capital Market Training Program)

# Finance Mentorship & Capital Markets Training Programs

## Program objectives:

To support and prepare students with an identified area of interest in capital markets/high finance to land internship positions.

## Main activities:

**FMP** - One on one meetings with a mentor / Small cohort meetings

**CMTP** - Virtual training courses in interview prep, online self study courses, live content coaching sessions provided by the Marquee Group

# Finance Mentorship & Capital Markets Training Programs

Program eligibility:

BCom Year 2 , BCom Year 3, Coop

Timeline:

Combined application opens in January.

**FMP** runs from May to October.

**CMTP** Training runs from March to June.

<https://mybcom.sauder.ubc.ca/career-experience/mentorship-specialty-programs/finance-mentorship-program>

<https://mybcom.sauder.ubc.ca/career-experience/mentorship-specialty-programs/capital-markets-training-program>



# Have a career question?

Talk to BCC Career Peer Advisors. They're senior students trained to help you with:

- Option choice
- Getting involved on campus
- Job applications
- Interview prep

[Book an appointment on COOL](#)

Or stop by drop-in

Monday to Friday 11 am – 2 pm  
in CPA Hall



# Talk to BCC Career Peer Advisors:



## Chloe Yip (She/Her/Hers)

Finance | Year 4 | Drop-in Hours: Thu 11:00 AM - 2:00 PM

[chloe.yip@sauder.ubc.ca](mailto:chloe.yip@sauder.ubc.ca) >



## Eliza Ponomareva (She/Her/Hers)

Finance | Year 3 | Drop-in Hours: Mon & Wed 12:30 PM - 2:00 PM

[elizaveta.ponomareva@sauder.ubc.ca](mailto:elizaveta.ponomareva@sauder.ubc.ca) >



## Jonathan Chan (He/Him/His)

Accounting + OB/HR | Year 5 | Drop-in Hours: Tue & Thu 11:00 AM - 12:30 PM

[jonathan.chan@sauder.ubc.ca](mailto:jonathan.chan@sauder.ubc.ca) >



## Iervinny Tanto (She/Her/Hers)

OB/HR | Year 5 | Drop-in Hours: Tue 11:00 AM - 2:00 PM

[iervinny.tanto@sauder.ubc.ca](mailto:iervinny.tanto@sauder.ubc.ca) >



## Kayla Jang (She/Her/Hers)

Accounting + Real Estate | Year 5 | Drop-in Hours: Mon 11:00 AM - 2:00 PM

[kayla.jang@sauder.ubc.ca](mailto:kayla.jang@sauder.ubc.ca) >



## Laurence Yeung (He/Him/His)

Marketing | Year 5 | Drop-in Hours: Fri 11:00 AM - 2:00 PM

[laurence.yeung@sauder.ubc.ca](mailto:laurence.yeung@sauder.ubc.ca) >



## Loic Chan (He/Him/His)

OPLOG | Year 5 | Drop-in Hours: Wed 11:00 AM - 2:00 PM

[loic.chankancheong@sauder.ubc.ca](mailto:loic.chankancheong@sauder.ubc.ca) >



## Sreeya Iyer (She/Her/Hers)

Marketing | Year 4 | Drop-in Hours: Mon & Wed 11:00 AM - 12:30 PM

[sreeya.iyer@sauder.ubc.ca](mailto:sreeya.iyer@sauder.ubc.ca) >



## Yui Mikuriya (She/Her/Hers)

BTM | Year 3 | Drop-in Hours: Tue & Thu 12:30 PM - 2:00 PM

[yui.mikuriya@sauder.ubc.ca](mailto:yui.mikuriya@sauder.ubc.ca) >

# Student Panel

**Toluwani Adekeye (SWIFT)**

**Danelle Anderson (SWIFT)**

**Jordan Black (CFAC)**

**Mahak Brar (PMF)**

**Caleigh Kuramoto (WestPeak)**

**Chloe Yip (PMF, BCC Career Peer Advisor)**



# Time for Questions from Audience



Session Feedback Survey



## Still have questions?

For questions about registering for your option or degree planning, contact the UGO:

Undergraduate Office (UGO)

165 - 2053 Main Mall

604.822.8333

[bcomquestions@sauder.ubc.ca](mailto:bcomquestions@sauder.ubc.ca)

Book an appointment or visit the virtual office at [mybcom.sauder.ubc.ca/ugo](https://mybcom.sauder.ubc.ca/ugo)

