



# Finance Option Info Session

October 24, 2024

# 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
- **UBC Sauder finance curriculum**  
Jan Bena & Markus Baldauf
- **Diversity of opportunity in finance**  
Pennie George
- **Importance of experiential learning: PMF & SWIFT**  
Pennie George
- **Hari B. Varshney Business Career Centre (BCC)**  
Lauren du Toit
- **Finance option declaration (UGO)**  
Jessica Pilfold
- **Student panel**
  - Mahak Brar
  - Harman Kahlon
  - Caleigh Kuramoto
- **Q&A**

# UBC Sauder Finance Faculty Presenters



**Markus Baldauf**

**Associate Professor**  
BoC Governor's Award Recipient  
M.Sc. Economics (LSE)  
Ph.D. Economics (Stanford)



**Jan Bena**

**Associate Professor**  
Finance Division Chair  
Ph.D. Finance (LSE)  
Ph.D. Economics (CERGE-EI)



**Pennie George**

**Adjunct Professor**  
Managing Director, PMF  
Program Director, UBC SWIFT



# Sauder UGO and BCC Presenters



**Jessica Pilfold**

Academic Advisor  
The Undergraduate Office (UGO)



**Lauren du Toit**

Career Strategist, BCom Careers  
Hari B. Varshney Business Career Centre (BCC)

# Why Consider a Career in Finance

- **The role of capital markets and finance in society continues to grow in importance.**
- Finance professionals and institutions are assuming broader societal responsibilities by focusing on critical areas such as climate finance.
- Pursuing a finance career requires **strong academic** foundations, complemented by **experiential learning** opportunities.
- **UBC Sauder is a leader in both** academics and practical experience.
- This event is organized to showcase the **Finance Option** as a pathway to diverse career opportunities in the finance industry.
- The finance industry offers a wealth of opportunities—make informed decisions about your career path!

# Why Consider a Career in Finance

- A **dynamic and innovative industry** with consistently high demand for graduates.
- Provides stimulating and exciting job **opportunities across various sectors**.
- Offers **rapid career progression** compared to many other industries.
- **Clear pathways for advancement** with ample opportunities for growth and excellence.
- Diverse career options available, tailored to **different skills and preferences**.
- Opportunities for **global work**, offering a broad international scope.
- **Abundant exit opportunities** for those looking to transition into other industries.

# Finance Careers

## Traditional areas

- Money Management
- Investment Banking
- Corporate Finance
- Commercial Banking
- Central Banking
- Venture Capital
- Private Equity

## Advancing areas

- Climate Finance
- FinTech
- Big Data and Digitalization in Finance with AI Integration
- Impact Investing
- Research and Regulation
- Financial Forensics and Compliance



# UBC Sauder 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
- Climate Finance\*
- 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.

# COMM 486T – FinTech

- Professor Markus Baldauf  
Ph.D. Economics  
(Stanford University)



# COMM 486T – FinTech

- New technologies/data disrupt and revolutionize financial markets
- Selection of this year's topics:
  1. Trading & Technology  
**Example:** How does high-frequency trading affect performance of equity markets?
  2. Alternative Data: Finance with nonfinancial data  
**Example:** How can you use satellite data to trade oil?
  3. Real Estate & iBuying  
**Example:** Can algos buy/sell houses?



# FinTech Topics (continued)

## 4. Robo-Advising: The rise of the machines

**Example:** Can AI help people make better financial decisions?

## 5. Payments

**Example:** How do credit cards differ from Alipay?

## 6. DeFi and Crypto

**Example:** How do stablecoins work?

# FinTech – Learning Outcomes

- After completion of the course, students will be
  - familiar with new technologies and trends;
  - able to assess recent innovations using traditional finance paradigms; and will be
  - well-equipped to understand regulatory debates and risks stemming from regulatory interventions around FinTech challenges.

# Resources for Finance Students Canvas Site

- The homepage for *everything* Finance at Sauder
  - Recruiting sessions
  - Experiential Learning Opportunities
    - Finance Related Clubs
    - Case Competition/Stock Pitch/Research Challenges
    - Finance Training Program & Mentorship
    - Access to Data and Finance Platforms



Access Here!→

## Resources for Finance Students

**Calendar**

[Scotiabank Recruiting Session](#) [November 2024](#) [Week](#) [Month](#) [Agenda](#) [+](#)

Sep 16, 5:30pm - 7pm

**Calendar:** [Resources for Finance Students](#)

**Location:** ANGUS 966-969 - Big 4 Conference Rooms - Henry Angus Building

**Details:** **Event Description:** Join us at our interactive Scotia on Campus event and learn how you can land your next internship, co-op, or new graduate position! This is your opportunity to gain insights into our unique recruitment process, discover











	WED	THU	FRI	SAT		
3	4	5	6	7		
		12p ...				
10	11	12	13	14		
		Fina...				
15	16	17	18	19	20	21
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22	23	24	25	26	27	28
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				5p B...		

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Access Here!→















▼ Finance Training Program & Mentorship Opportunities	
	CFA Institute - Free Access to Materials
	RBC Mentorships for Women in Investment
	Sauder Portfolio Management Foundation - PMF
	Sauder Women+ in Finance Training - SWIFT
	<a href="#">Bloomberg Market Concepts</a> 
	EWIF - Future of Finance Program (Spring 2024 Cohort)
	UBC Executive Mentorship Program
	Front Row Ventures
	Financial Modelling & Interview Prep Program (FMIPP)

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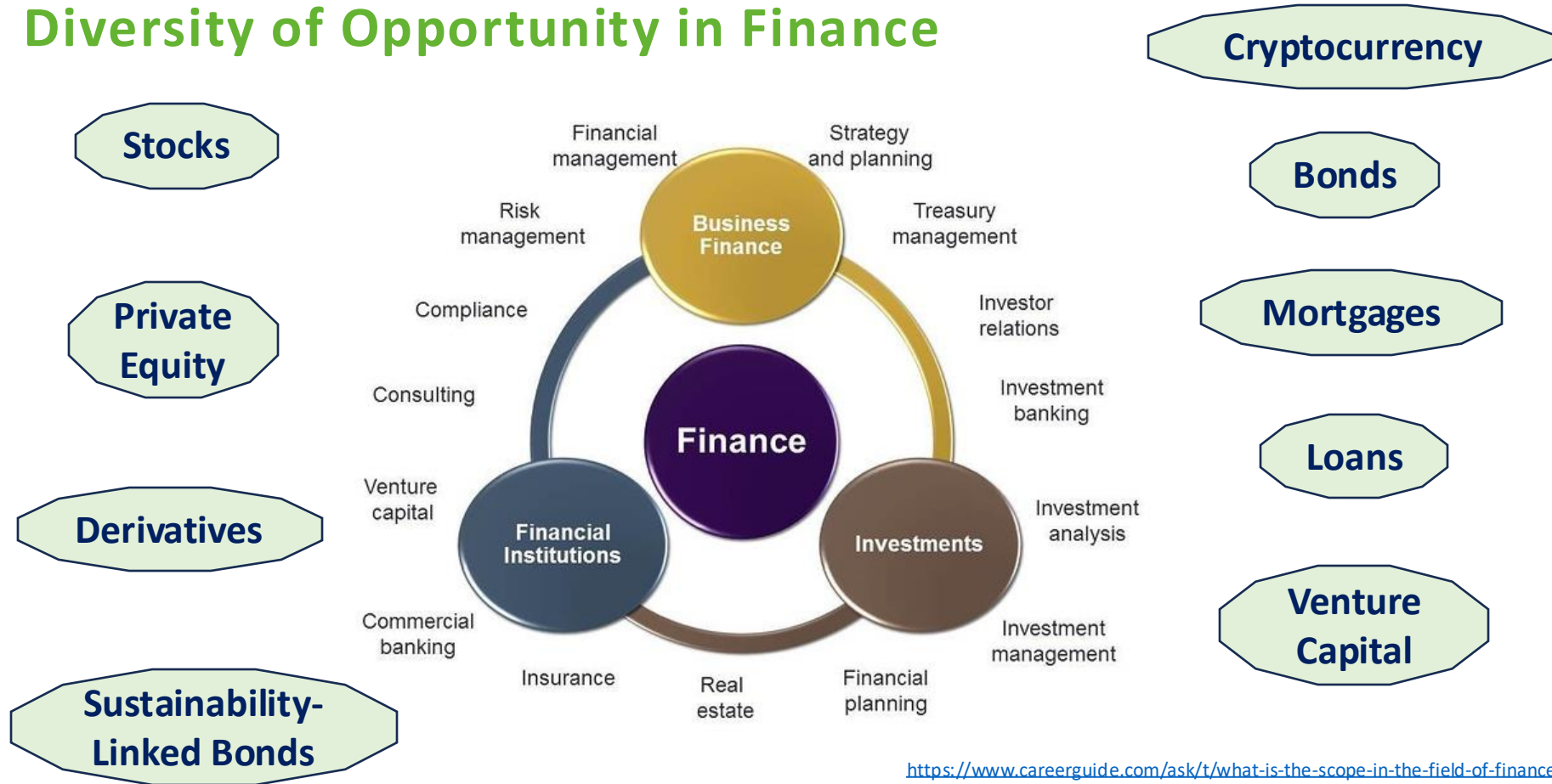
▼ Sauder Finance Resources - Access to Data and Platforms	
	<a href="#">Wayne Deans Investment Analysis Centre</a>
	<a href="#">Bloomberg Access</a>
	<a href="#">Capital IQ Access</a>
	<a href="#">Morningstar Access</a>
	<a href="#">PitchBook Access</a>
	<a href="#">Refinitiv Workspace Access</a>
	<a href="#">SDC Platinum Access</a>
	<a href="#">Wharton Research Data Services Access</a>
	<a href="#">Regulatory filings with U.S. Securities and Exchange Commission (SEC) Access</a> 
	<a href="#">Regulatory filings with Canadian Securities Administrators (CSA) Access</a> 
	<a href="#">PACIFIC Exchange Rate Service Access</a>
	<a href="#">Wall Street Journal</a>
	<a href="#">The Economist</a>

**Finance is  
a world  
of opportunity**





# Diversity of Opportunity in Finance



# Demand for Diversity in Industry

Fintech

Congratulations to the inaugural UBC SWIFT 2023 Cohort!



Behavioural  
Finance

UBC SAUDER  
SCHOOL OF BUSINESS



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.



ESG



ICON  
FELLOWSHIP  
PROGRAM  
2023 – 2024



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

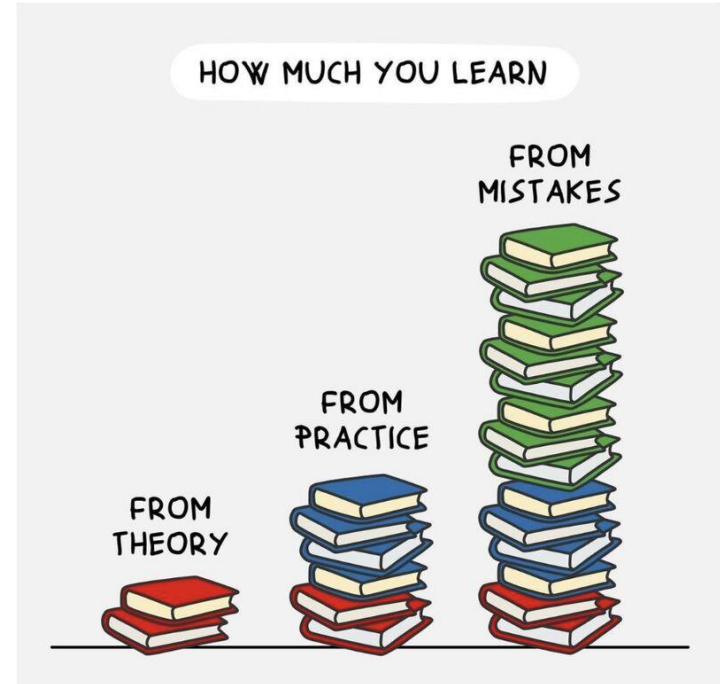
**Learning by doing:** Students connect theory & knowledge learned in the classroom to real-world situations.

## 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 \$11 million
  - Access to mentors, workshops, and summer internship
  - 7-9 students selected per year, typically during Year 2
  - Class of 2027 will be admitted in January 2025
- **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 17, 2024 at 12:30pm

**Working in the Capital Markets:** Myth vs Fact

Oct 28, 2024 at 3:30pm



**Investing in Growth Equity**

Nov 7, 2024 at 12:30pm

**Sauder Women+ in Finance Training – Pre-application Info Session**

Nov 26, 2024 at 12:30pm

**Portfolio Management Foundation – Pre-application Info Session**

Nov 28, 2024 at 12:30pm

**\* All sessions will be held in HA 491. No registration required.**



## PMF & SWIFT Timelines

- Key dates for students are posted on the PMF & SWIFT websites
- Applications open on Dec 17
- Applications close on Jan 7

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

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

Oct-Dec 2024	Attend monthly workshops about capital markets careers; open to all Sauder students.
November 2024	Attend a SWIFT pre-application information session
December 2024	Enroll in the 'UBC SWIFT 2024/25 Community' group on Canvas to access the SWIFT application form. Requirements will include resume, transcript, personal paragraph, video submission, and instructor information.
January 2025	Application deadline, interviews & group activity, admission offers.
Feb-Apr 2025	SWIFT training and professional development. Attention to reconciling classroom theory with practice; developing fluency in financial markets, financial statements, and financial modelling.
May-August 2025	Paid internship opportunity, in or away from Vancouver. Students will be responsible for transportation and living expenses.
Fall 2025	SWIFT training and professional development. Assist in encouraging and developing future cohorts.

**Hari B. Varshney**

**Business Career Centre**

# BCom Career Coaches (Strategists)



**Michael Clarke**  
Associate Director



**Hatinder Hari**  
Career Strategist



**Misa Zhang**  
Career Strategist



**Lauren du Toit**  
Career Strategist



**David Edwards**  
Career Strategist

# 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, Co-op

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>





# Finance Mentorship Program (FMP)

In this program, you'll be matched with an industry professional to have mentorship meetings over the summer to:

- ✓ Gain a better understanding of finance career paths in your area of interest
- ✓ Prepare you for the upcoming internship recruitment season

Mentors in the program come from various buy-side and sell-side areas, including:

Investment Banking, Private Equity, Venture Capital, Asset Management, Sales & Trading, Equity Research



# Financial Modelling & Interview Prep Program

Through the FMIPP program, students gain lifetime access to below 14 courses from [Wall Street Oasis](#).

Accounting Foundations: 60+ Video Lessons	PowerPoint for Finance: 60+ Video Lessons
Excel Modelling: 120+ Video Lessons	Venture Capital: 160+ Video Lessons
Financial Statement Modelling: 60+ Video Lessons	Investment Banking Interview Package: 30+ Hours
Valuation Modelling: 170+ Video Lessons	Private Equity Interview Package: 9+ Hours
DCF Modelling: 75+ Video Lessons	Hedge Fund Interview Package: 5+ Hours
LBO Modelling: 120+ Video Lessons	Consulting Interview Package: 5+ Hours
M&A Modelling: 120+ Video Lessons	
Real Estate Modelling: 110+ Video Lessons	

Program Cost: 65 CAD

Program Eligibility: All BCom students

\*The registration of the program is closed now, but we'll re-open it in Jan 2025!

# 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



## Meet your Career Peer Advisors



**Yui Mikuriya, She/her**  
BTM & Data Science



**Patrick Braun, He/him**  
Finance



**Toluwani Adekeye, She/her**  
Finance



**Sanat Sehgal, He/him**  
Operations & Logistics



**Erping Sun, He/him**  
BUCS



**Adi Pradeep, He/him**  
Marketing



**Harshit Abichandani, He/him**  
Marketing & Business Analytics



**Harman Kahlon, He/him**  
Finance & Accounting



**Pranathi Kanisetty, She/her**  
OB/HR



Book your 1-1 appointment  
with one of us on COOL!

# Student Panel

**Mahak Brar**

Portfolio Management Foundation

**Harman Kahlon**

Career Peer Advisor

**Caleigh Kuramoto**

WestPeak, TA





# Option Declaration

The Undergraduate Office

# Self Declaration

- You will be able to self-declare option on Workday when you attain a Year 3 class standing.
- You can declare in one option only.
- Some options have minimum course grade requirements.

## Option Declaration Request webform

- If you are unable to self-declare an option,
- or if you want to switch options after self-declaration.



## Double Option

- You may complete courses in another option and count them towards elective requirements.
- Cannot complete a second option in Finance or General Business Management.
- Limited seat availability for non-option students.

**Thank you for attending!**  
**Provide session feedback ->**



## 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)

