THE THACHER SCHOOL

Navigating the Job Search and Career Preparedness

Adam Elegant
http://www.adamelegant.com

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Objective

For the past 15+ years, I have presented "Navigating the Job Search" to graduate, undergraduate and high school students at various schools and organizations around the country. I have weaved together an interactive collection of real-life interview questions, stories, advice, quotes, coaching and friendly role plays that help students prepare and increase their comfort level. My presentation covers the various types of job functions and reinforces what it takes to successfully navigate the job search. Students leave the session with confidence, knowledge and a plan for a positive outcome.

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Agenda

1. Introduction
2. Wall Street roles and job functions
3. Level 100 - The basics of Navigating the job search
4. Level 200 - Prepare and be strategic
5. Level 300 - Practical advice
6. Level 400 - Crafting your pitch
7. Actual interview questions - time to participate
8. Final thoughts
9. Q&A

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Introduction - my path

Born in **Miami Beach**

1991 - **Ransom Everglades High School**

1995 - **Washington University (St. Louis)**

- Political Science Major
- Business Administration Minor
- Kicker on football team

1999 - **University of Colorado MBA**

- Finance/Technology & Innovation Mgmt
- Case Study

1995-1997	**AIG**
1999-2013	**Goldman Sachs** (24 interviews)
2014-2019	**KKR** (30 interviews)
2019-	**Baker Street Advisors** (10 interviews)

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My family

Rebecca

Adam

Samantha (22)

Alice (19)

Jake (15)

Louie the dog (5)

Kentfield, CA

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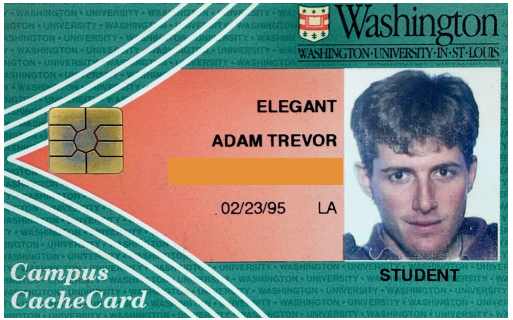
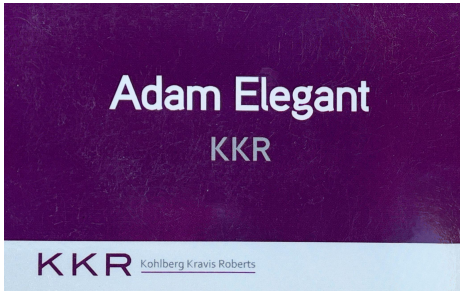
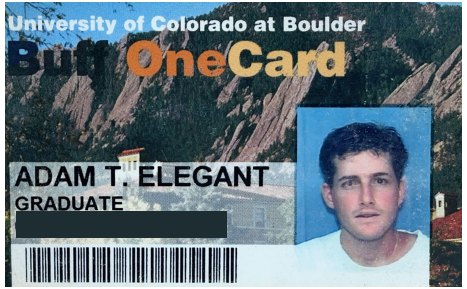
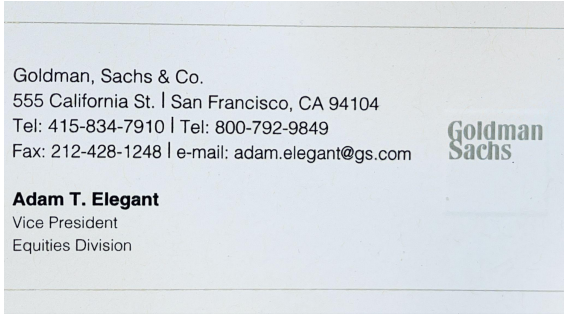
A quick trip down memory lane









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A few folks I met <u>and/or</u> worked with along the way….

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Ground rules

- Highly Interactive
- Comfortable Participation
- Questions
  - Ask anytime
  - Turn the question on me

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Roles at Investment Banks and Private Equity Firms

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Representative Investment Banks

Goldman Sachs

J.P.Morgan

Morgan Stanley

Bank of America Merrill Lynch

Moelis

citi

BARCLAYS

CREDIT SUISSE

Deutsche Bank

UBS

Jefferies

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Job Functions at Investment Banks

- **Mergers and Acquisitions (M&A)**: advising companies on combining with or acquiring other businesses, including valuation, negotiation, and deal structuring
- **Capital Raising**: assisting clients in raising money by underwriting and selling stocks (equity) and bonds (debt) to investors, which includes managing initial public offerings (IPOs)
- **Financial Advisory**: providing clients with strategic financial advice on topics like risk management, corporate governance, and restructuring
- **Wealth Management** - advising high net worth families on investment strategy, tax matters, family gifting, charitable giving and estate planning
    - Real-time wealth management pitch
- **Sales & Trading** – institutional sales, securities trading, product structuring and prime brokerage
- **Research** – equity and fixed income analysis, reports
- **Asset Management** – portfolio management, investment products, distribution

Roles I have had during my career

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Roles and Titles at Investment Banks

- Analysts – financial modeling, pitch books
- Associates – manage analysts, client interaction
- Vice Presidents – deal execution, client relationships
- Directors/Executive Directors – lead teams, strategy
- Managing Directors / Partners – revenue generation, major clients

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Representative Private Equity Firms

THOMABRAVO

TSG CONSUMER

vista

CARLYLE

Hellman & Friedman

BainCapital

APOLLO

Blackstone

TPG

KKR

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Job Functions at Private Equity Firms

- **Deal Sourcing and Diligence:** identifying and reviewing potential investments
- **Investing**: involves extensive financial modeling, valuation, structuring, and negotiation regarding potential acquisitions
- **Operations**: actively working with the management of portfolio companies to improve profitability and operational efficiency
- **Fundraising**: Raising capital from investors (limited partners) for new funds
- **Investor Relations** – reporting and communication with LPs
- **Capital Markets** – arranging financing, planning IPOs, secondary buyouts, strategic sales

Roles I have had during my career

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Roles and Titles at Private Equity Firms

- Analysts/Pre-MBA Associates – deal sourcing, modeling
- Post-MBA Associates – manage diligence, portfolio analysis
- Vice Presidents / Principals – oversee deal processes, manage teams
- Directors – originate deals, manage portfolio companies
- Managing Directors / Partners – fundraising, strategic leadership

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Non-Revenue Roles

- **Operations**: handling the administrative tasks of transactions, including settlements and record-keeping
- **Compliance and Risk Management**: ensuring the firm adheres to all regulations and managing the financial risks associated with its activities
- **Technology (IT)**: developing and maintaining the trading systems and other technological infrastructure used by the firm

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Navigating the Job Search

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Level 100

The basics

One page resume, don't lie or exaggerate

Get a good night's sleep before interviews

Dress nicely and be presentable

Be **early** (on-time = late)

Be courteous and polite to EVERYONE

Turn phone off well before initial greeting

Practice your intro / greeting

Mind your Zoom etiquette (if applicable)

Make eye contact

Prepare and **ask** **thoughtful** questions

Wri~~te a t~~hank you note (or email)

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Level 200

Prepare and be strategic

Connect with your network!

"Collect people" and keep in touch

Be "intellectually curious" and be a **sponge**

Research who you are meeting

Be interesting / engaging

Formulate opinions and share them

Bring a paper, article or recommendation

Befriend the "gatekeeper" / find your guide

Make things easy for people

Be mindful of your social media profile

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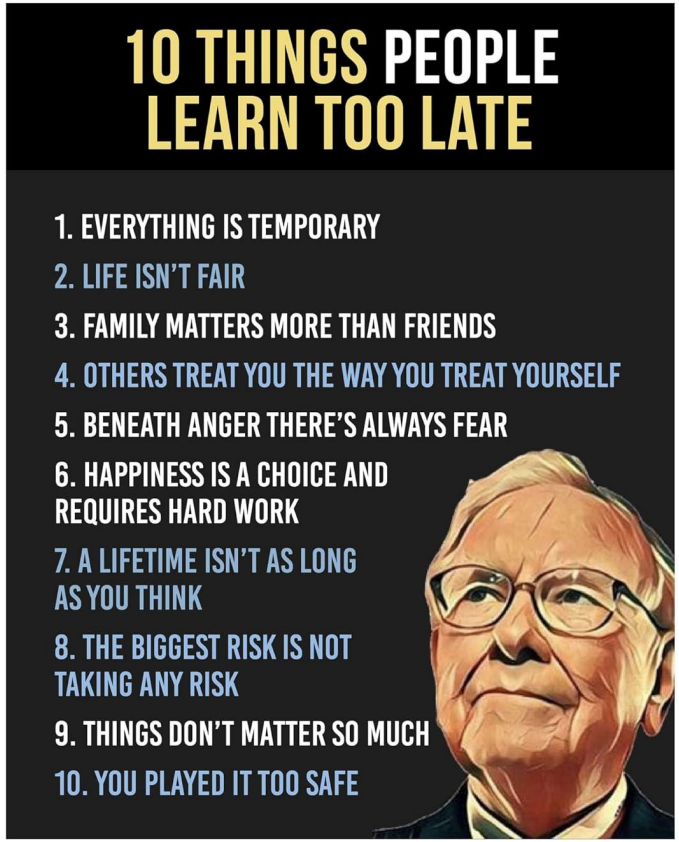
Intermission

Some wisdom from Warren Buffett



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Level 300

Practical advice

Stay organized throughout the process

Turn your brain into a database, triangulate and connect the dots

Find a common interest, connect - LinkedIn

Writing is a skill - practice it

Listen! (time for a quiz)

Follow-up! (one email is not following up)

Don't disqualify yourself or overreach

Don't have your parents call....

Take rejection in stride... it's part of life

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Success

"You miss 100% of the shots you don't take"
--hockey legend Wayne Gretzky

Success Rate:

Frank Sinatra
1,200 songs, 209 hits (17%)

Babe Ruth:
8,399 attempts, 714 home runs (8.5%)

Pablo Picasso:
150,000 pieces. 1,170 hits (0.7%)

The math of success **is brutal.**
Only the ones that are willing to take a beating, and keep swinging will make it.

@billion.dollars.motivation

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Level 400

Crafting **your** pitch

The job search is a sales process

Be friendly, positive, confident

Get comfortable with your words / refine phone skills / practice in front of mirror

Rehearse your “elevator pitch”

Start with “Thank you” and appreciation, not an apology

Avoid empty phrases

Find the “pain point” and run with it

Have no fear

Quantify, quantify, quantify

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Actual interview questions and interactions

Your elevator pitch?

Dream Job?

Two pieces of rope

Stanford question?

Weakness?

Let's buy a watch

Persistence?

Baseball question

Stock pitch?

Pet Peeve?

Airport question?

Mantra or quote you live by?

Sarah Palin question?

How many months have 28 days?

Title of your autobiography?

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Final thoughts

Washing machines work hard, you need to work smart - **Rob Thompson**

If you can't explain it simply, you don't understand it well enough - **Albert Einstein**

If you don't know where you are going, you'll end up someplace else —**Yogi Berra**

It's not what you don't know that gets you in trouble, it's what you think you know for certain that just ain't so - **Mark Twain**

Book recommendations, favorite quotes and additional resources are all available at http://www.adamelegant.com

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Q&A

10 THINGS THAT REQUIRE

ZERO TALENT

Being On Time
Making An Effort
Being High Energy
Having A Positive Attitude
Being Passionate
Using Good Body Language
Being Coachable
Doing A Little Extra
Being Prepared
Having A Strong Work Ethic

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