

# ROTMAN FINANCE ASSOCIATION



Rotman School of Management  
UNIVERSITY OF TORONTO



PRESENTATION TO

**New RFA Members**

## **Rotman Finance Association**

**Kick-Off / Second Year Panel – 2018/2019**



# Your RFA Team – Club Executives and Heads

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**Rami Ismail**  
*President*



**Andreas Weltzien-Straathof**  
*Executive Vice President*



**Rihab Rubaiyat**  
*Executive Vice President*



**Paula Reimann**  
*VP, Finance*



**Mahin Sohail**  
*VP, RWomen*



**Thomas Choi**  
*VP, External*



**Pavan Dayal**  
*Head of Development*



**Roland Llewellyn-Thomas**  
*Head of Investment Banking*



**Gurman Athwal**  
*Head of Corporate Banking*



**Angela Liang**  
*Head of Sales & Trading*



**Jay Jung**  
*Head of Corporate Finance*



**Frederico Gomes**  
*Head of Equity Research*

# Your RFA Team – Club Directors

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**Vinicius Vilhena**  
*Director,  
Investment Banking*



**Shai Bautista**  
*Director,  
Sales & Trading*



**Jason Chin**  
*Co-Director,  
Corporate Banking*



**Graeme McCallum**  
*Co-Director,  
Corporate Banking*



**Sukant Sharma**  
*Director,  
Equity Research*



**Chris Ridge**  
*Co-Director,  
Development*



**Thomaz Fonesca**  
*Co-Director,  
Development*



**Bogdan Vesic**  
*Co-Director,  
Corporate Finance*



**Fabio Almeida**  
*Co-Director,  
Corporate Finance*



**Stephanie Alavedra**  
*Director,  
RWomen*

# Offering Overview

## Support students through the recruiting process

- Introduce Rotman students to the breadth of opportunities available to them in all fields of finance
- Connect students with successful alumni and industry leaders
- Ensure Rotman students are the best prepared to tackle the competitive job market

## What You Should Know About the RFA

### Active and Engaged Alumni Network

- Large alumni network is engaged with students through the RFA, and takes an active interest in students' recruiting
- Alumni span all areas of finance

### Thorough and Differentiated Interview Preparation

- Best-in-class rigorous interview preparation that draws on years of successful recruiting experience of RFA members
  - E.g. case competitions, one-on-one interview preparation, customized RFA guides

### This is NOT the Rotman Investment Banking Association

- RFA members end up in all areas of finance each year
- The RFA can help prepare you for a variety of different roles in finance, and we actively collaborate with the other finance focused Rotman clubs to get you what you need

Through an extensive and active alumni network, industry receptions, guest speaker events, case competitions and job-specific interview training, RFA club members receive the best tools to tackle today's increasingly competitive job market

# What the RFA Offers Students

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## Industry Overview

- Speaker Series
- 2<sup>nd</sup> Year Panels
- Informal meetings with 2nd year students
- Facilitate introductions with alumni

## Interview Preparation

- One-on-one mock interviews with 2<sup>nd</sup> years
- In-depth interview guides drawing on the experience of RFA alumni
- Case Competitions

## Networking

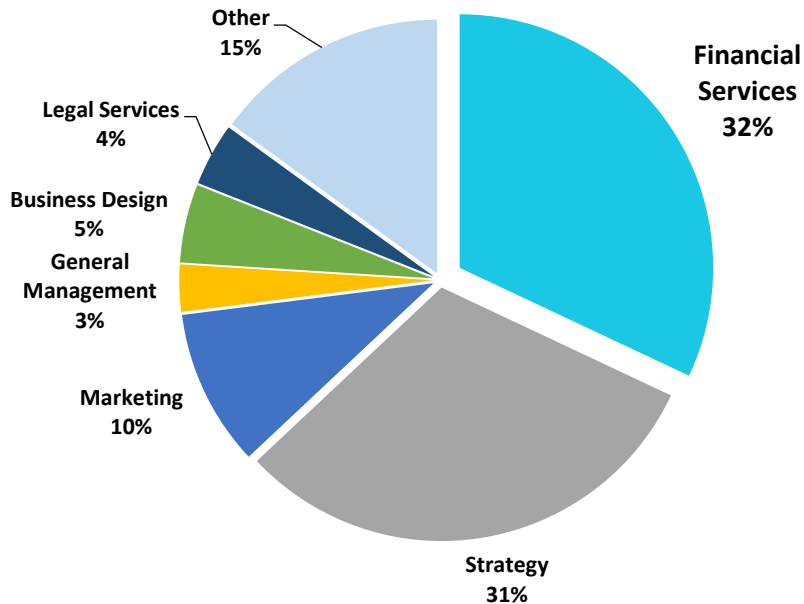
- Facilitate introductions / “coffee chats” with large, successful and active alumni network
- RFA networking and industry events
- Case Competitions

The RFA offers some of the best and most rigorous interview preparation available

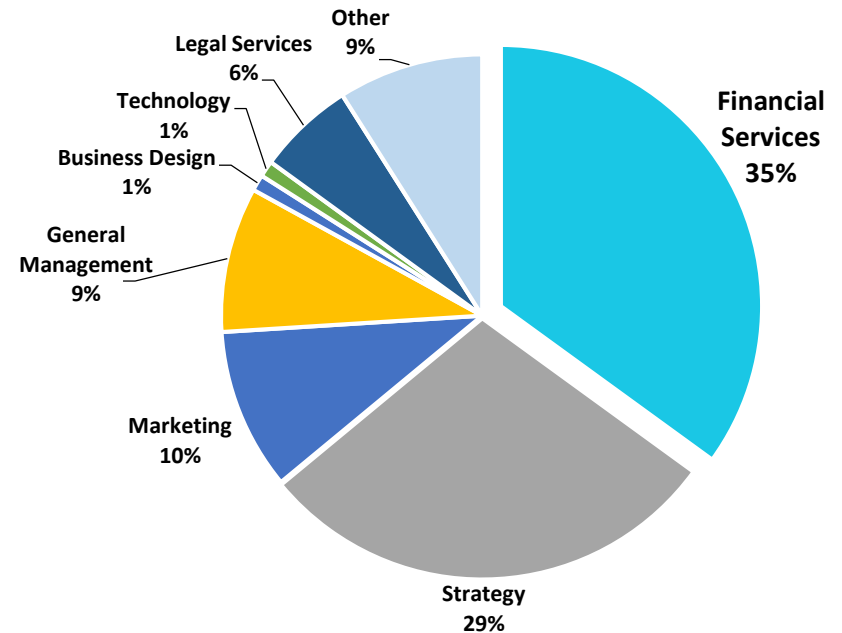
# Rotman Internship and Full Time Employment Statistics

Interest in finance remains strong with students increasingly seeking non-traditional roles in financial services

Class of 2019 Internship Statistics



Class of 2018 Full Time Employment Statistics








## Financial Services break-down (%)






- Investment Banking: 24%
- Corporate / Commercial Banking: 18%
- Sales and Trading: 4%
- Banking others<sup>(1)</sup>: 9%

# RFA Events

## Case Competitions

 BMO Capital Markets	Stock Pitch	<ul style="list-style-type: none"> <li>Teams of 2 are assigned stocks for which they must create and present stock pitches</li> </ul>
 THOMSON REUTERS	Integrative Case	<ul style="list-style-type: none"> <li>Teams of 2 (1 Finance, 1 Strategy) tackle an integrative case designed by Thomson Reuters</li> <li>Guaranteed summer internship interviews for top teams</li> </ul>
 RBC Capital Markets	M&A Case / Networking	<ul style="list-style-type: none"> <li>Students learn how to analyze capital markets transactions in a speed networking event</li> </ul>
 TD Securities	Client Case Competition	<ul style="list-style-type: none"> <li>Teams of 4 conduct a strategic review of a TD client with the goal of optimizing long-term value</li> </ul>
 CIBC	Investment Banking Case Competition	<ul style="list-style-type: none"> <li>Teams of 4 work through a buy-side M&amp;A mandate, tasked with valuing the target company and structuring appropriate financing</li> </ul>
<b>GATE / WCM</b>	Capital Markets Design Sprint	<ul style="list-style-type: none"> <li>Students apply their design skills to help foster corporate cultures that are attractive and inclusive for women; speakers are women in leadership roles in the financial services industry</li> </ul>

## Networking Events / Interview Preparation









 Scotiabank	Scotia Super Saturday	<ul style="list-style-type: none"> <li>4 students have mock interviews, on stage in front of their peers, with Scotia representatives</li> <li>Large networking event follows with RFA alumni in premier financial institutions</li> </ul>
Morgan Stanley	Networking Event	<ul style="list-style-type: none"> <li>Morgan Stanley Investment Banking professionals provide networking and interview advice</li> </ul>
 NATIONAL BANK FINANCIAL MARKETS	Networking Event	<ul style="list-style-type: none"> <li>Select students will have an opportunity to attend a capital markets networking event at NBF's Toronto office</li> </ul>
 RFA	Second Year Panel	<ul style="list-style-type: none"> <li>Second year students share insights and experiences from their summer internships</li> </ul>
 RFA	Industry Night	<ul style="list-style-type: none"> <li>Off-campus social networking event with RFA alumni</li> </ul>
 RFA	Mock Interviews	<ul style="list-style-type: none"> <li>RFA executives conduct rigorous mock interviews based on their interview experiences</li> </ul>

# Tentative Calendar


SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
2-Sep	3-Sep	4-Sep	5-Sep	6-Sep	7-Sep	8-Sep
				 RFA Club Kickoff & Student Panel 3.30PM-5.30PM: Fleck Atrium 6PM-8PM: Duke of York		
9-Sep	10-Sep	11-Sep	12-Sep	13-Sep	14-Sep	15-Sep
				 WCM Panel Event 5pm - 6pm D-Hall	 BMO Stock Ptch Kickoff Timing: 5PM-7PM Location: RT 2030	
16-Sep	17-Sep	18-Sep	19-Sep	20-Sep	21-Sep	22-Sep
			 Morgan Stanley Speaker Series 6PM-8PM Career Center Lounge (RT 287)		 BMO Stock Pitch First Round 4PM-8PM RT 127, 133 & 147; RTL 1010, 1030	
23-Sep	24-Sep	25-Sep	26-Sep	27-Sep	28-Sep	29-Sep
		Financial Accounting Midterm (RSM)	 BMO Stock Ptch Finals 5PM-9PM Toronto Board of Trade			
30-Sep	1-Oct	2-Oct	3-Oct	4-Oct	5-Oct	6-Oct
	 Capital Markets Design Sprint 5pm - 8.30 pm Location : Fleck Atrium	   RBC Capital Markets RBC Deal Study Kickoff Timing: TBD Location: TBD	Scotiabank Night (RSM)			
7-Oct	8-Oct	9-Oct	10-Oct	11-Oct	12-Oct	13-Oct
	Thanksgiving: University Closed	   RBC Capital Markets RBC Deal Study Submission Timing: TBD Location: TBD				



# Tentative Calendar

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
14-Oct	15-Oct	16-Oct	17-Oct	18-Oct	19-Oct	20-Oct
TERM 1 FINALS						
21-Oct	22-Oct	23-Oct	24-Oct	25-Oct	26-Oct	27-Oct
RSM BLACKOUT PERIOD (BREAK BETWEEN TERMS 1 & 2)						
28-Oct	29-Oct	30-Oct	31-Oct	1-Nov	2-Nov	3-Nov
		 TD Case Competition Kickoff 5:30PM-7:30PM RT 1065	 Thomson Reuters VUCA Day 11:30AM-3:30PM TR (233 Bay Street)			 Scotia Super Saturday 9AM-5PM Fleck Atrium; RT 142 & 157
4-Nov	5-Nov	6-Nov	7-Nov	8-Nov	9-Nov	10-Nov
		 TD Case Competition Finals Timing: TBD Fleck Atrium				
11-Nov	12-Nov	13-Nov	14-Nov	15-Nov	16-Nov	17-Nov
		 RBC Deal Study Finals Timing: TBD Location: RBC	 CIBC Case Competition 7PM-9PM RT 287		Finance Mid-Term Exam	
18-Nov	19-Nov	20-Nov	21-Nov	22-Nov	23-Nov	24-Nov
			 CIBC Case Competition Finals 9AM-12PM RTL 1020, 1025 & 1030 4PM-8PM Fleck Atrium	 RFA Industry Night Timing: TBD Location: TBD		

# Tentative Calendar

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
25-Nov	26-Nov	27-Nov	28-Nov	29-Nov	30-Nov	1-Dec
	MCV Mid-Term Exam					
2-Dec	3-Dec	4-Dec	5-Dec	6-Dec	7-Dec	8-Dec
9-Dec	10-Dec	11-Dec	12-Dec	13-Dec	14-Dec	15-Dec
	TERM 2 FINALS					
16-Dec	17-Dec	18-Dec	19-Dec	20-Dec	21-Dec	22-Dec
	 Kickoff: 1-1 Mock Interview s for January Recruitment	1-1 Mock Interview s for January Recruitment	1-1 Mock Interview s for January Recruitment	1-1 Mock Interview s for January Recruitment	1-1 Mock Interview s for January Recruitment	1-1 Mock Interview s for January Recruitment
23-Dec	24-Dec	25-Dec	26-Dec	27-Dec	28-Dec	29-Dec
				1-1 Mock Interview s for January Recruitment	1-1 Mock Interview s for January Recruitment	1-1 Mock Interview s for January Recruitment

# RFA Events & Sign-up

## What to do:

- Read emails from the RFA notifying you about events
- Sign-up in advance, capacity is limited!
  - Event registration link on RWorld
- Cancellation permitted only before the cancellation deadline
- If event is full, keep checking back for availability
- **If in doubt, contact us!**

## What NOT to do:

Missing Events	<ul style="list-style-type: none"><li>▪ Cancellation after the deadline may lead to revoking future access to events and resources</li></ul>
Leaving Early	<ul style="list-style-type: none"><li>▪ Leaving events and competitions mid-way is not acceptable</li><li>▪ Do not register if you have more important things going on</li></ul>
Punctuality & Preparation	<ul style="list-style-type: none"><li>▪ Please arrive 5 minutes before schedule; late arrivals not permitted</li><li>▪ Come prepared to each event</li></ul>
Notes	<ul style="list-style-type: none"><li>▪ If you need to take notes, bring a pen and paper</li><li>▪ Taking cell phone pictures or video's is strictly prohibited</li></ul>
Cell Phones & Bags	<ul style="list-style-type: none"><li>▪ In silent mode and in your pockets only</li><li>▪ Leave bags in lockers</li></ul>

# RFA External Events

## Capital Markets Business Formal

### Dress Code for Men

#### Suits

- Tailored, conservative color scheme
- Pin stripes ok, but keep them subtle



#### Shoes

- Lace-ups
- Black or dark brown in color



#### Shirts

- Clean and pressed
- Need collar stays
- Fitted to your size
- Light in color (white preferred)

#### Socks

- Should match your suit

#### Belts

- Should match your shoes

### Dress Code for Women

#### Suits

- Conservative color scheme
  - More flexibility than for men
- Dress pants, skirt / dress with matching jacket
- Skirt should be at least at the knee



#### Shoes

- No open toed/boots
- Flat shoes or heels are acceptable
- Conservative colors are best



#### Shirts

- Clean and pressed
- Fitted to your size
- Formal blouses are an option
- Subtle colors and patterns

# Networking Basics

Smart, open ended questions drive productive conversations that leave an impression

## THE BASICS

### General Mindset

- **Be humble**
- Be confident, but not arrogant
- Follow up, don't be a one hit wonder
- Send a thank you letter on the same day at a reasonable time
- START NETWORKING WITH SECOND YEARS NOW!

### Think About What the Person on the Other Side is Thinking:

- Did this person approach me in a professional manner?
- Did he/she prepare for this meeting and have a structured approach in asking me questions?
- Can I sit next to him/her for 12 hours a day?
- Would I be comfortable introducing this person to my boss?

## DOs & DON'Ts

### What you should be asking

- Who they are, their education / professional background
- How they got into the industry
- If they worked at various financial institutions, why are they with their current employer
- Any advice they can offer in breaking into the industry and building a successful career

### What you should NOT be asking

- ...anything you can Google! – don't waste their time!
- Are you hiring? How many job openings?
- What do you think about the markets?
- How many hours do you work?
- How much do you get paid?
- Here is my resume, can you fix it?
- I did XYZ, do you think I can work here?

# Second Year Rotman Peers

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- Class of 2017 – the RFA is not just the Executives and Directors
  - 350+ second year students ~100+ of which worked in a finance or finance related fields over the summer

Sales & Trading

Equity Research

Investment  
Banking

Corporate Credit

Corporate Finance

Graduate Rotation  
Programs

Private Equity

Wealth  
Management

- Complete list of second years with summer internship details
  - CC Resources > “Where I Worked Last Summer”

**Second Years should be your first point of contact**

# RFA upcoming opportunities: Get Involved!

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- **GBC Club Rep for the RFA (1 position)**

- Elected through class wide GBC voting

- **RFA Class Representatives (5 positions, 1 per section)**

- Represent your section and be the voice for your section within the organization
- Partake in bringing the student body exciting and value added events
- Grow your organizational and leadership skills while helping your fellow students
- Process is competitive, based on initial screening and class votes

- **BMO Stock Pitch (teams of 2)**

- BMO Capital Markets (“BMOCM”) will assign each team a stock to pitch
- At the kick-off event RFA members will receive a detailed overview of what is expected
- Following the kick-off, a stock pitch tutorial will be provided by second year students
- Students will also be provided with a second year mentor to assist with questions throughout

**Make an impression and build a brand!**

# RFA | Second Year Student Panel



**Rami Ismail**  
*President*

*Summer Associate - Investment Banking  
BMO Capital Markets, Metals & Mining*



**Andreas Weltzien-Straathof**  
*Executive Vice President*

*Summer Associate - Investment Banking  
RBC Capital Markets, Global Energy*



**Rihab Rubaiyat**  
*Executive Vice President*

*Summer Associate - Investment Banking  
Morgan Stanley, Generalist (Toronto)*



**Paula Reimann**  
*VP, Finance*

*Summer Associate - Corporate Banking  
CIBC Capital Markets, Global Trade*



**Pavan Dayal**  
*Head of Development*

*Summer Associate - Investment Banking  
RBC Capital Markets, Global Energy*



**Angela Liang**  
*Head of Sales & Trading*

*Sales & Trading Summer Associate  
TD Securities, Asset Securitization Group*



**Frederico Gomes,**  
*Head of Equity Research*

*Summer Associate, Equity Research  
Desjardins Capital Markets, Industrials*



**Jay Jung**  
*Head of Corporate Finance*

*Summer Associate, Corporate Treasury  
Thomson Reuters (Toronto)*