“The Goizueta Finance Group exists to drive coordination and collaboration among the finance extra-curricular organizations at Goizueta in order to deliver robust programming that will engage, challenge and prepare BBAs for futures in finance.”
This semester marked the launch of the Goizueta Finance Group, the parent organization of four student-run, undergraduate finance groups…

Pre-Finance Society

Goizueta Finance Academies

Goizueta Investment Management Group

Alternative Investments Group

…and we are off to a great start.
The Goizueta Finance Academies are three preparatory programs designed to help equip students with the skills needed to obtain a summer internship in a certain sector of finance. Our programs include:

- Investment Banking Academy (IBA)
- Sales & Trading Academy (STA)
- Private Banking Academy (PBA)

Goizueta Investment Management Group (GIMG)

GIMG is an undergraduate, student-managed investment fund managing a portion of Emory’s endowment in a long-only, U.S. equity portfolio. In addition to our investment activities, we are extremely passionate about bringing greater financial literacy to underserved youth in the Atlanta area.

Alternative Investments Group (AIG)

The Alternative Investment Group is tasked with educating and engaging students in the areas of hedge funds, venture capital and private equity. The group holds educational seminars, guest speakers and competitions to accomplish this objective.
What do our clubs do?

What are our objectives?

1. **Foster peer-to-peer mentorship.**

2. **Engage with professionals and alumni.**

3. **Provide hands-on, practical experiences outside of class.**

4. **Never stop learning, and never stop teaching.**

5. **Create a best-in-class undergraduate finance experience**
Aaron Weiner (Chair)
Senior, Centerview Partners
President, IB Academy
Co-President, GIMG

Paul Kagan
Junior
Director of Operations

Priya Reddy
Sophomore
Co-Pres., Pre-Finance Society

Sumaali Chheda
Junior
Co-Pres., Pre-Finance Society

Alex Fields
Senior, Perella Weinberg
President, AIG

Josh Kramer
Senior, J.P. Morgan
Co-Pres., Priv. Banking Academy
Julianna Schneider
Junior
Director of Marketing

Dhananjay Somani
Senior
Director of Media

Jared Cohen
Senior, Barclays HY Trading
President, S&T Academy

Aakash Parlecha
Senior, EY
Co-President, GIMG

Gen Ishikawa
Senior, J.P.Morgan
Co-Pres., Priv. Banking Academy

Bruce Rubin
Senior, J.P.Morgan
Co-Pres., Priv. Banking Academy
Pre-Finance Society

Group Overview

Established this semester, PFS is an organization aimed at educating freshmen and sophomores who are interested in learning more about the finance industry. The group operates in partnership with the Pre-Business Society in the Emory College and holds open events introducing the industry, potential careers and current events. The PFS “dual mandate” is as follows:

1. Acquaint underclassmen with the world of finance to provide a better understanding of whether or not they want to pursue it.

2. Guide and prepare those who do want to explore opportunities in finance so that they are well positioned for success.

Fall 2014 Accomplishments

<table>
<thead>
<tr>
<th>General Body Meeting</th>
<th>Finance 101 &amp; Deep Dive</th>
<th>MarketWatch</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Pre-Finance Society Kickoff had 74 underclassmen attendees.</td>
<td>Official introduction and basic overview of finance and the major sectors. Led by finance faculty Professor Green and Professor Valerio.</td>
<td>Introduction to current events and the importance of reading periodicals. Led by juniors and seniors with interview experience in markets and current events.</td>
</tr>
<tr>
<td><strong>Goal</strong>: provide students with an overview of finance, introducing basic theory, lingo, and industry structure</td>
<td><strong>Goal</strong>: acquaint students with the purpose of finance and initiate fluency in the different sectors.</td>
<td><strong>Goal</strong>: inspire students to gain market literacy and remain up-to-date on current events.</td>
</tr>
</tbody>
</table>

Facilitated the process of connecting underclassmen with upperclassmen. Familiarized students with other membership and leadership opportunities within GFG. Supplied freshmen and sophomores with basic tools for understanding finance.
Goizueta Finance Academies

Group Overview

Established this semester, the Goizueta Finance Academies are a series of weekly, senior-led seminar programs designed to guide underclassmen through the summer recruiting process. We currently offer Academy programs for:

- Investment Banking
- Sales & Trading
- Private Banking

The Academies cover topics like:
- Industry Overview
- Networking
- Resume Help
- Interview Preparation
- Analyst Lifestyle
- Current Events

Fall 2014 Accomplishments

<table>
<thead>
<tr>
<th>200+</th>
<th>15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Enrollment</td>
<td>Senior Mentors</td>
</tr>
</tbody>
</table>

Key Accomplishments
- All programs held weekly seminars to provide guidance on the summer recruiting process
- IBA held the 2014 IB Challenge, a case competition where teams advise on a potential acquisition
- STA held the 2014 Trading Simulation, a virtual trading experience mimicking the work of traders

Testimonials
“[This] is one of the primary reasons I have an offer.”
“The interview prep kept me on track.”
“[The seniors] are incredibly dedicated to helping us.”

Leadership

- **Investment Banking Academy**
  - Aaron Weiner
    - Senior
  - Alex Fields
    - Senior

- **Sales & Trading Academy**
  - Jared Cohen
    - Senior

- **Private Banking Academy**
  - Josh Kramer
    - Senior
  - Gen Ishikawa
    - Senior
  - Bruce Rubin
    - Senior
**Group Overview**

Founded in 2011, GIMG is a student-managed investment fund that manages a portion of Emory’s endowment in a long-only, U.S. equity portfolio. In addition, the group is passionate about bringing greater financial literacy to underserved youth in the Atlanta area.

**Student interest in GIMG continues to grow.**

<table>
<thead>
<tr>
<th></th>
<th># of Applications</th>
<th>Total Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>13</td>
<td>16</td>
</tr>
<tr>
<td>2012</td>
<td>26</td>
<td>19</td>
</tr>
<tr>
<td>2013</td>
<td>42</td>
<td>25</td>
</tr>
<tr>
<td>2014</td>
<td>81</td>
<td>43</td>
</tr>
</tbody>
</table>

**Fall 2014 Accomplishments**

- This semester, GIMG saw the largest number of applications since inception
- We published a proprietary financial literacy curriculum for use in our community programs
- We joined Kennesaw State, Georgia Tech and the University of Georgia as a founding school of *The Southeastern*, a new publication with the cooperation of regional student-managed funds
- We are developing a proposal to raise a second, non-equity fund to expand GIMG’s capabilities

**Cumulative Performance**

![Cumulative Performance Graph](chart.png)

Note: Market data as of close on January 2, 2015

**Leadership**

- **Aaron Weiner**
  Co-President | Senior

- **Aakash Parlecha**
  Co-President | Senior

- **Ethan Anderson**
  COO | Junior

- **Connor Stark**
  CIO | Senior

**Current Holdings**

![Current Holdings Pie Chart](chart.png)

- AAPL, 4.1%
- BGS, 1.9%
- DAL, 2.7%
- DEO, 5.4%
- FB, 3.5%
- GE, 4.0%
- GOOGL, 2.0%
- GOOG, 2.0%
- IWR, 9.4%
- LAD, 3.6%
- LVS, 3.0%
- MNKD, 1.7%
- PAG, 3.1%
- RHHBY, 2.5%
- SLB, 4.3%
- SPY, 14.4%
- TTWO, 5.2%
- WBC, 3.8%
- WBA, 2.8%
- WFC, 4.6%
- WFC, 4.6%
Alternative Investments Group

Group Overview

AIG is Goizueta’s extra-curricular organization dedicated to engaging and educating students in the private equity, venture capital and hedge fund industries. The group holds educational seminars, guest speakers and competitions to do so. The group was founded in 2007 and is now reincorporated under the GFG umbrella.

Fall 2014 Accomplishments

<table>
<thead>
<tr>
<th>Mailing List Members</th>
<th>Recurring Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>93</td>
<td>30</td>
</tr>
</tbody>
</table>

Educational Seminars

We strive to give undergraduates exposure to the major areas of alternatives by holding introductory seminars taught by professors. This fall, we held:
- **HF 101**: Introduction to Hedge Funds
- **PE 101**: Introduction to Private Equity & Venture Capital

Guest Speakers

In partnership with the Emory Center for Alternative Investments, students were able to get exposure to some notable practitioners in the world of alternatives, including:
- **David Bonderman** (Founding Partner, TPG Capital)
- **Neal Aronson** (Managing Partner, Roark Capital Group)
- **Paul Brown** (CEO, Arby’s—Arby’s is a portfolio company of Roark)

Competition

We hosted the **2014 Hedge Fund Competition** this fall, where 10 teams virtually traded $10M for 10 weeks based on a strategy of their choosing.

Leadership

<table>
<thead>
<tr>
<th>Alex Fields</th>
<th>Haoyu Li</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>VP</td>
</tr>
<tr>
<td>Senior</td>
<td>Senior</td>
</tr>
</tbody>
</table>

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Goizueta Finance Group
Plans for Spring 2015

Group Wide Goals

- Maximize student awareness and participation
- Develop a GFG-wide community involvement effort
- Organize and engage our finance alumni base

Now that we’re up and running, we want to fully utilize the benefits of shared resources among our programs. Collectively, we hope to serve as the principal extra-curricular outlet for students pursuing futures in finance. In order to do so, we hope to strengthen GFG awareness throughout the Goizueta community. In addition, we would like to leverage GIMG’s current community involvement success to create a GFG-wide mission and spirit of giving back. Finally, we would like to continually strengthen our relationships with alumni and industry professionals.
Pre-Finance Society

- Continue to involve underclassmen in the world of finance; expand mentorship
- Start exposing students to membership and leadership opportunities in other GFG programs

Goizueta Finance Academies

- Help students complete the summer recruiting process and sign an offer
- Transition focus to “on-the-job” skills (e.g., Bloomberg, FactSet)
- Share keys to obtaining a full-time offer

GIMG

- Explore new outlets to amplify returns
- Expand coverage of industry trends and publish whitepapers
- Continue growing our financial literacy efforts and set precedent for other GFG programs to follow suit

AIG

- Organize the 2014 Buyout Competition (a private equity case competition)
- Expand seminars to include basic modeling (e.g., LBO models)
- Bring in new industry practitioners to share their insights and experiences

We are continuously re-evaluating our programs to ensure that we are best serving the needs of our members. This includes maximizing our value-add while broadening our membership base. Furthermore, we are working toward increasing opportunities for faculty involvement in our events.
Group Highlight: IB Academy

The Investment Banking Academy—one of the three Goizueta Finance Academies—is a weekly, senior-led seminar program designed to guide underclassmen through the Investment Banking summer recruiting process and help them prepare for their summer internships. The group provides an overview of the industry, extensive interview preparation and tips for networking and navigating their internship search.

### Membership

<table>
<thead>
<tr>
<th>Total Enrollment</th>
<th>Average Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>142</td>
<td>51</td>
</tr>
</tbody>
</table>

### Academy Rating

<table>
<thead>
<tr>
<th>Helpful</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Helpful</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>13</td>
<td>26</td>
</tr>
</tbody>
</table>

Average = 4.7

### 2014 IB Challenge

**Case**

Advise Coca-Cola’s Board of Director’s on their proposed acquisition of The WhiteWave Foods Company

**Participants**

17 undergrad teams, 9 alumni judges from regional investment banking and private equity firms

1st Place: “Great Wall Advisors”

### Networking Response Rate

62%

### Offer Conversion

<table>
<thead>
<tr>
<th></th>
<th>Class of 2016</th>
<th>Class of 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Rd.</td>
<td>15</td>
<td>24</td>
</tr>
<tr>
<td>Superday</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Offer</td>
<td>8</td>
<td>0</td>
</tr>
</tbody>
</table>

### Summer 2015 Offers

J.P. Morgan  
Tudor Pickering Holt & Co  
Perella Weinberg Partners  
Jefferies  
Wells Fargo  
Piper Jaffray  
Guggenheim  
SunTrust

Dear Members of the Greater Goizueta Community,

In Spring 2014, the Presidents of Goizueta Investors, GIMG and AIG came together to address several shared concerns about the existing finance extra-curricular experience, such as redundancies and gaps in programming, insufficient personnel and succession issues, and overlapping event scheduling and marketing efforts.

The Goizueta Finance Group was formed this semester to serve as a parent organization that drives coordination and collaboration among Goizueta’s four finance extra-curricular programs—the Pre-Finance Society, Goizueta Finance Academies, GIMG and AIG. While each group maintains its distinct mandate and structure, all groups are now able to share functions such as marketing and event planning, collaborate on events, and identify opportunities to strengthen the overall finance extra-curricular experience. We have seen that this reorganization has already allowed each group to better serve the student body. It is our objective to contribute to developing a stronger, more fundamentally-sound finance environment for undergraduates to realize their full potential while at Goizueta.

This is a unique opportunity to re-invigorate the student experience in the finance community, and we would like to invite all who are interested to help make these ambitions a reality. As we progress through the years, we intend on fully leveraging the benefits of our structure to strengthen the opportunities for undergraduate extra-curricular involvement.

We are committed to delivering our best efforts in every undertaking, and we are excited for what the future holds. Thank you for your support of the Goizueta Finance Group family during our inaugural semester.

Board of Directors
Goizueta Finance Group