

Finance and Economics Society



“Be Ambitious, Be Prepared, Be Humble”

CLUB OVERVIEW:

Mission and Abstract

The Finance & Economics Society's mission is to provide members with the knowledge, mentality, and experience necessary to succeed in their respective industries. We emphasize humility during interactions with professionals and peers, along with perseverance and dedication throughout students' undergraduate studies. We are continuously working on bridging the gap between Baruch College students and professionals within the financial services industries.

Club Structure:

Our club is composed of the top 4 positions comprising of our Executive Board:

- President
- Vice President
- Secretary
- Treasurer

We then have our general board, which is comprised of the below positions as well as the members of the Financial Analyst and Investment Banking Program.

- Vice President of Membership
- Vice President of External Relations
- Vice President of Marketing
- Vice President of Mentorship
- Chair of Mentorship
- Director of the Investment Banking Program
- Chair of the Investment Banking Program
- Director of the Financial Analyst Program
- Chair of the Financial Analyst Program
- Investment Banking Analysts (approx. 6 per semester)
- Financial Analysis Analysts (approx. 6 per semester)

Should individuals not want to hold a leadership position/supporting role within our club, they can become “general members”. As outlined on our website, to become a general member, students must attend at least 6 meetings to be considered an active member of the organization. Members receive access to club

resources, interview prep, mock interviews, resume workshops, priority to school-wide speaker sessions hosted with outside companies, alumni relationships etc.

MEMBER BYLAWS:

- We expect our members to abide by the school's code of conduct
- We do not tolerate hazing, inappropriate language, lewdness, cyber bullying etc.
- All members will work together to foster an engaging learning environment
- We focus on camaraderie and professional development
- All violations of the school's code of conduct will be escalated to the executive board and dealt with accordingly
- All violations of conduct and violations deemed inappropriate or worthy of reporting will be escalated to student life.

MENTORSHIP:

Mission and Abstract

Our Mentorship Program is where we invite successful professionals to mentor incoming aspiring underclassmen. We focus on professional development by providing weekly assignments, by organizing face-to-face meetings, by giving mentees ample feedback and by enhancing our camaraderie. Our main goal is help our mentees become interview ready and to create their personal brand. All of our assignments will revolve around those two targets.

Program Overview

This program is semester-long and consists of a few interconnecting parts, as follows:

Mentoring: Mentees will be paired up with a suitable mentor. Mentor-mentee relationship should aim towards identifying what the mentee is passionate about and creating their personal brand incorporating their passion. Mentors can also help in achieving academic, professional and/or personal goals.

Weekly Assignments: Mentees will be required to complete and submit weekly assignments to the FES Mentorship team. These assignments should be discussed with their mentor prior to submission to attain feedback and/or guidance in doing them. Part of the weekly assignment will be to submit a program update as well as to write a newsletter about current finance/economics events. No late assignments will be accepted.

Mandatory Workshops: There will be 2 types of mandatory workshops

- Thursday Club Workshops: These workshops are FES' actual club sessions in which all general and prospective members are invited to attend. These Thursday workshops are MANDATORY for all mentees.
- Mentorship Specific Workshops: There will be at least two MANDATORY mentorship workshops. One being on Professionalism and the other on Finance 101. Dates will be set beforehand, attendance by mentees is expected.

Mentee Stock Pitch: The final project of the semester will consist of a stock pitch. Mentees will be paired up with each other and will pitch a stock based on fundamental and technical analyses to the whole club. To aid them in this process a mentor from the Sales and Trading team will also be assigned as an additional mentor to the group in ADDITION to each mentees individual mentor. Pitches will be judged by mentors and invited guests.

Expectations and Guidelines

Mentors:

- Submit bi- weekly progress reports detailing mentee work status, face to face meetings and development to FES Mentorship team
- Meet with mentee face-to- face at least twice a month
- Maintain a professional relationship with mentees
- Review mentee work before submission
- Maintain integrity when helping mentee with weekly assignments

Mentees:

- Initiate conversations and/or meet-ups with mentors
- Maintain a professional relationship with mentors
- Do due diligence before reaching out to mentors
- Submit all work by given due date- two strike rule (no exceptions)
- Attend all FES mandated events
- Notify FES committee when attendance of said events will not be possible
- Contact FES committee should it be difficult to maintain communication with mentor

FINANCIAL ANALYST PROGRAM & INVESTMENT BANKING PROGRAM:

Mission and Abstract

Our Analyst Programs are a vital part of our organization. Successful upperclassmen create a program for our underclassmen where they can learn fundamentals of accounting, finance and banking.

Program Overview

This program is semester-long and consists of a few interconnecting parts, as follows:

Weekly Workshops: Analysts will be mandated to attend a weekly workshop on Tuesdays during club hours. These workshops are set based off a curriculum that the program managers will distribute to you. Skills set to work on include but are not limited to financial modeling, DCFs, Comparable Company Analysis, Financial Statement Analysis, Macroeconomic Indicators, deal analysis etc. These workshops are meant to help analysts learn the key

Weekly Assignments: Analysts will be required to complete and submit weekly assignments to the FES Analyst teams. These assignments will have to do with reading the news, looking into deals, preparing excel documents to be shared during meetings etc. The board is always here to help with learning and advice on how to go about them, so feel free to reach out!

Mandatory Workshops: There will be 2 types of mandatory workshops

- **Thursday Club Workshops:** These workshops are FES' actual club sessions in which all general and prospective members are invited to attend. These Thursday workshops are MANDATORY for all analysts.
- **Tuesday Specific Workshops:** as highlighted above

Analyst Presentations: The analysts will be expected to present at least twice a semester on what they are learning in their Tuesday workshops. Ample time to prepare will be given. These sessions are meant to be targeted towards honing public speaking skills and to allow analysts to become familiar with speaking about the projects they are working on.