



July 14th, 2023

VIRTUAL YOUNG PROFESSIONALS ROUND TABLE

Join us as we bring together a diverse group of accomplished young professionals from various fields and industries to share their valuable insights and experiences. This event serves as a platform for interns to gain practical knowledge, expand their networks and explore different career paths. Through interactive discussions, our expert speakers will provide guidance on navigating the professional world, offer tips for success and share personal anecdotes.

Table of Contents

Session One - Speakers: 2

Session Two - Speakers: 7

Video Contributors: 14

Session One

10:30 AM - 11:30 AM



2023

YOUNG PROFESSIONALS VIRTUAL ROUND TABLE

Speakers List



Hannah Kenny

**Consultant Relations Analyst at
First Eagle Investments**



Hannah is an Analyst on the Institutional Team at First Eagle Investments, a long-only value asset manager with \$129B in assets under management. Hannah is focused on supporting the Consultant Relations channel across the North American institutional investor market to bring in new business. Prior to joining the firm in 2021, Hannah was with FactSet Research Systems. Hannah received her BSBA with a double major in Finance and Project Management from Elon University in the spring of 2020, and is a Certified Associate in Project Management (CAPM).



Morgan Behrens
Paralegal at
Virginia & Ambinder LLP



Morgan graduated from Elon University in 2020 with a degree in Political Science and minors in Classical Studies and Philosophy. While in school, Morgan interned at a law firm, in a political office, and on a political campaign trail. Immediately after graduation, she rejoined the campaign and moved to New Hampshire where she worked as a Political Grassroots Organizing Director. After the election, Morgan moved to New York to work as a paralegal at a firm that specialized in employment discrimination and union law. Morgan now works at a firm that specializes in Title IX assault cases while studying for the LSAT to pursue a legal career.



Alyssa Mallon
Real Estate Agent at
HomeStarr Realty



Alyssa graduated from Elon University in 2020 with a bachelors of science in project management and minor in accounting. In spring of 2020, Alyssa obtained the Certified Associate in Project Management (CAPM) certification and graduated with letters next to her name. Following graduation, Alyssa started her career as an Associate Internal Auditor for Wells Fargo. Within 6 months, she was promoted to Auditor and after another 6 months, she was promoted to Senior Auditor. In October of 2022, Alyssa decided it was time for a career change and pursued a career in Real Estate part-time after her 9-5 and on the weekends. As business became busier, Alyssa decided to leave Wells Fargo in June of 2023 to continue her career in real estate full-time. Currently she's done over \$50,000 in sales & is continuing to actively grow her business.



Grace Stewart

**Federal Data Center Sales Executive
at Dell EMC - Army, Navy**



Grace Stewart graduated from Elon University in May 2020 with a Bachelor of Arts in History and a triple minor in Economics, Business Administration, and Italian. A month and a half later she started her three-year training program in data center sales at Dell Technologies in Austin, Texas. Grace specializes in storage, backup, and cyber security solutions. She completed her first year as an Associate Inside Sales Rep in the medium business space where she averaged 100 daily cold calls and finding 5 new opportunities a week. Next, she was promoted to an Inside Data Center Sales Executive supporting the United States Army and Navy. During her tenure in that role, Grace found \$9million in new pipeline and successfully closed \$6.5million in revenue. She has been in that role for two years now but come the beginning of August she will be promoted into a Field Data Center Sales Executive supporting other various federal programs, thus completing her inside to field training program. Grace's favorite parts of her job is building and sustaining customer relationships, being a solution specialist on her core team, and her passion for her customers' missions.

Session Two

12:30 PM - 1:30 PM



2023

YOUNG PROFESSIONALS VIRTUAL ROUND TABLE

Speakers List



Claudia Lucciola

Fixed Income Advanced Specialist at
Bloomberg LP



Claudia Lucciola graduated from the University of South Carolina, where she studied international business and finance with a concentration in data analytics and minor in German. She is working towards her master's degree in international relations and affairs at Cambridge University. In her professional role as a Fixed Income Product Specialist at Bloomberg, she plays a crucial role in assisting clients with their investment decisions and trade opportunities using Bloomberg terminal and Excel integration. As a team leader, Claudia excels in ensuring that her team achieves their KPIs while also assigning the right individuals to appropriate projects. She has a keen eye for prioritizing high-impact projects and ensuring everyone stays on track. Claudia's dedication and leadership skills led her to become a team lead in August 2022, where she continues to make valuable contributions to her team's success.



Rob Lucas
Investment Banking Analyst
at RW Baird



Robert Lucas joined Baird in 2022 as a member of the Restructuring team. Prior to joining Baird, Robert was a Senior Consultant at FTI Consulting, within the Corporate Finance & Restructuring segment. Robert received his bachelor's degrees in finance and accounting from Elon University.



Bailee Castillo

Fixed Income Trading Associate at StoneX



Bailee graduated from Elon University in May 2020 as a member of the Honors Program with a double major in Finance and Economics. She obtained her SIE during her senior year knowing that she eventually wanted to pursue a career in the securities industry.

After graduation, Bailee started her career at FactSet as a Client Solutions Associate. 9 months later she realized the work from home life wasn't for her and took an interim job at a startup called Masterworks as a Sales Development Representative. In May 2021, life came full circle and she was hired full time at StoneX, the company she interned for twice in college, as a Mortgage-Backed Securities Operations Associate. In September 2022, she was promoted to Fixed Income Trading Associate and currently focuses on structuring and trading CMOs.



Chase Prather
VC Analyst at
Sweater Ventures



Experienced Venture Capital Analyst with a deep passion for identifying and investing in groundbreaking companies. Leveraging three years of hands-on experience in the industry, I have been actively involved in a wide range of activities that have honed my expertise. My role has encompassed conducting thorough analyses of sectors and market trends for potential investment opportunities and meticulously evaluating company financials and projections to assess growth potential. With an impressive track record, I have actively contributed to over 30+ investments, collaborating with investment teams to drive successful outcomes. My keen eye for innovation, coupled with a data-driven approach, allows me to make informed investment decisions.



Jake Mazza

**Corporate Banking Associate
at Bank of America**



Jake Mazza is a seasoned professional, renowned for his military service and financial acuity. He began his professional career in the United States Air Force, where he served as a Deputy Disbursing Officer in Italy and Turkey. His leadership in significant audit processes, resulting in millions of dollars recovered, led to his recognition as Airman of the Year for three consecutive years (2012-2014). Upon completing his military service, Jake transitioned into the financial technology sector with FactSet in New York City. As an Investment Management Consultant, Jake demonstrated his expertise in managing valuable buy-side accounts and developing innovative financial models. Additionally, he served as an EMS Account Manager and Implementation Consultant, where he pioneered successful multi-asset EMS implementations for several prominent clients. Jake is currently employed by Bank of America as a Corporate Banking Associate, specializing in the Energy, Power, and Renewables sector, where he covers some of the country's largest energy companies. Concurrently, he is a Readiness Manager with the United States Air Force Reserve. In addition to his professional endeavors, Jake is pursuing an MBA at New York University, underscoring his dedication to lifelong learning. Beyond his work and academic commitments, Jake devotes time to the Bank of American Military Support & Assistance Group and Student Veterans of America.



Marybeth Nemecek
Health Solutions Associate
at FTI Consulting



Marybeth Nemecek graduated from Elon University in May 2021 with a B.S.B.A. in Economic Consulting. In September 2021 she started her career at FTI Consulting as a Consultant in the Forensic and Litigation Consulting (FLC), Health Solutions segment. On a day to day basis, Marybeth specializes in data analytics and supports healthcare organizations in responding to disputes, mitigating risk, and maintaining regulatory compliance.

Video Contributors

END OF SESSIONS



Nate Forker
Advisory Analyst at
Deloitte



Nate Forker is a highly accomplished professional with a triple major in international business, finance, and entrepreneurship. With a diverse background that includes internships at Wells Fargo and other reputable companies, Nate brings a wealth of practical experience to his role as an Advisory Analyst at Deloitte, where he has been making significant contributions for the past three years. His exceptional skills in quality control, financial analysis, and relationship building have enabled him to deliver strategic insights and forge strong partnerships with clients. Nate's unwavering commitment to excellence and his ability to navigate complex business challenges make him a valuable asset to any team or project.



Meghan Murray
Financial Services Consultant at
EY



Meghan Murray is a Financial Services Consultant at EY in their Charlotte, NC office. She focuses on risk management and has experience working in the Risk & Capital, Enterprise Data Governance, and Regulatory spaces. She graduated from Elon University in 2021 with degrees in Finance and International Business. In her free time, Meghan loves to attend exercise classes, hang out with friends, and find the best dessert spots.



Emily Patterson
Project Manager at Guidepoint
MS Candidate NYU



What advice would you give your younger self?

I would tell my younger self not to plan too far ahead and let life work out how it is meant to. If you work hard and put your best self forward good things will come to you and it is important to not get too caught up when things do not go as planned, especially things you cannot control. Likewise, having a positive relationship with everyone around you pays off. The world is a small place especially as you advance into niche careers and it never hurt anyone to be a kind person to everyone around you.

What aspects of your career journey do you believe were most critical for your success?

I believe the aspects unrelated to my career path are those that have helped me the most. I majored in dance in college and although I do not use that degree today, I have learned so many life lessons and developed a sense of professionalism because of the experiences that I had in the arts industry. I believe it is so important to branch out of the status quo of what will bring you success and still keep passions and interests in your life.

Why is finding a mentor important?

Finding a mentor is important because they often times will have learned their lessons through experience both for better and worse. I think there is great value in having multiple mentors as well. You are then able to take bits and pieces of how you see yourself within each individual and apply those facets to develop a unique path for yourself.



Kaylee Riemann
PPC Specialist at
Union



Marshall Simmons
Internal Rate Derivatives
Associate at PNC



Quotes from the Video Contributors:

"Sometimes you will be stressed and feel slightly uncomfortable, you may not feel 100% confident that you know something, and that's just a sign that you are able to grow."

- Meghan Murray

<https://youtu.be/CFzUfVOSc8g>

"It's really important that when you're in school, you ensure that you are focusing on skills that will make you happy in your career in the future."

- Nate Forker

<https://youtu.be/e6RTLrHzMtc>

"I think that there is a very fine line between being confident and being cocky so I think especially within interviews I think finding that balance is going to be the gold standard."

- Marshall Simmons

"Be a person that people want to work with."

- Kaylee Riemann

<https://youtu.be/RrP2jHPiXjw>