



Financial Matters

DEPARTMENT OF FINANCE NEWSLETTER

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Eller



Message from the Department of Finance Head



Greetings from Eller! I'm finishing my first year as department head after 18 years as a faculty member in the department. We have had a lot of fun and interesting things happen in the last year, so I hope you enjoy reading about our students, faculty and programs. Most exciting perhaps is that we were fully in person this year and held our first Spring graduation breakfast since 2019! It was great to see students' faces and meet their families.

OTHER HIGHLIGHTS:

The department provided a *Wall Street Journal* subscription to the entire University, thanks to loyal university alumni recognizing David Laskin '20 BBA (Finance) as PAC-12 Scholar Athlete of the Year by donating \$200,000, to be split between the Arizona Men's Golf Team and the Finance Department.

We upgraded the computers in the Financial Markets Center after receiving a generous donation from alumni Brad Wolk '95 BSBA (Finance) (see p. three).

Demand for our students continues to be strong—over 90 percent of finance graduates have accepted a full-time job or graduate school as of graduation. A special thank you to our many alumni who continue to help the next generation of Eller finance students succeed: Leading companies hiring Eller finance interns and graduates include, among others, Barclays, Bank of America/Merrill Lynch, Citi, Deloitte, Deutsche Bank, Goldman Sachs, J.P. Morgan, Northern Trust, Siemens and Wells Fargo.

For the second year in a row, we provided Allsup Engagement Awards to finance undergraduate majors to assist students with summer internship expenses. We awarded eleven Chartered Financial Analyst (CFA) and four Chartered Alternative Investment Analyst (CAIA) exam scholarships to graduate and undergraduate finance students. Overall, we awarded more than \$232,000 in 55 scholarships to finance undergraduate and master's students.

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ON THE COVER: Brad Wolk '95

Department News

It's been a time of great excitement in the Department of Finance as we welcome many new personnel to our department.

Jason Sandivik will be joining this fall as an assistant professor and has a specialty in corporate finance, with research focusing on corporate governance and labor economics. **Balint Horvath** will also be joining the department as a lecturer with a specialty in banking and financial economics, and hopes to continue his research here as well. We welcomed the promotion of **Daniel Kinnear** from adjunct professor to a full-time lecturer. **Virginia Zazueta-Blackman** also joined the department as the new Administrative Support Assistant. *(News continued on page two)*



We continue to increase students' exposure to industry through events and experiential learning:

- A team of five finance students, including Madison Coder—the finance department's outstanding senior—Grace Keating, Ricky Wu, Austin Sobotka and Shuaib Joomin, led by senior lecturer, Matt Haertzen, placed first at this year's Regional CFA Institute Research Challenge on February 8, 2022. This marks their third victory after wins in 2019 and 2020.
- We held the sixth annual Meritage Homes Real Estate Challenge. A special thank you to Steve Hilton and Meritage Homes for sponsoring this event.
- In conjunction with the Financial Modeling World Cup, the department hosted the first Financial Modeling University Championship this spring. This stage was online only, but a second stage will be held in the fall semester and will culminate with an in-person finals event in early December in Tucson, Arizona. Thanks to David Brown for organizing this event!
- Twenty Investments Club students went to New York City and met with alumni on Wall Street.
- Ten Commerical Real Estate Club members went to Dallas, where they were hosted by Darren Schackman and met with professionals at Millcreek, Weitzman, Goldman Sachs, KDC and Hines.
- A team of students participated in the Chicago Quantitative Alliance (CQA) Investment Challenge.

Seventy young women participated in the Annual Professional Women in Finance Brunch in January (with featured speaker alumna Daniela Cuevas '20 BSBA (Finance), Associate at J.P. Morgan). Special thanks to students Jacqueline Reaney and Kate Martin for heading up this event.

Page two gives just a few examples of how our award-winning faculty's cutting-edge research extends the state of knowledge in finance.

Finally, I'd like to give a heartfelt thank you to our donors. These donations not only provide scholarships, but also fund almost all of our student engagement and experiential learning opportunities. If you were ever a beneficiary of these donations, I encourage you to give back to the department so that we can not only continue, but grow these opportunities. If every student who graduated in the past 10 years donated even \$100 each year to the department, we could quadruple the amount of money available for these experiences!

Please reach out to me if you have comments, want to get involved, or give back.

Kathleen M. Kahle

Department Head

Thomas C. Moses Professor in Finance

kkahle@arizona.edu

Meritage Residential Real Estate Competition

This popular event was back to being held in person this year. The full story, including a picture of the first place team, is on page five.



Department News (cont.)

Finance faculty continue a tradition of excellent teaching.

Assistant Professor **Andrea Rossi**, who teaches international finance, received the Eller Student's Choice Award in Finance this year, and Associate Professor **David Brown**, won both the Departmental Scrivner Teaching Award and has been recognized by *Poets&Quants* as a Best Undergraduate Business Professor for 2021. Brown is the second finance faculty to be recognized by *Poets&Quants* – **Alice Bonaimé** was recognized last year.

On the research side, **Rick Sias**, Tyler Family Endowed Chair and professor of finance, won the CFP Board Center for Financial Planning Best Paper Award for his paper "The Negativity Bias and Perceived Return Distributions: Evidence from a Pandemic" at the 2021 CFP Board Academic Research Conference. He also was interviewed by NPR about how writing style might spell the difference between success and failure when applying for loans. In a collaboration with the MIS department, Sias also published a paper on molecular genetics and information technology usage at *MIS Quarterly*.

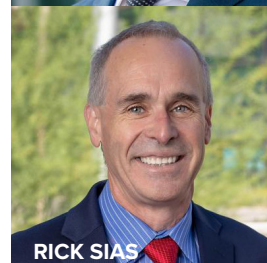
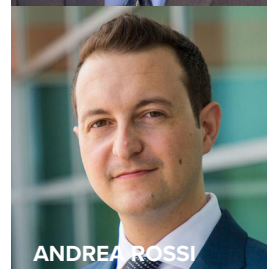
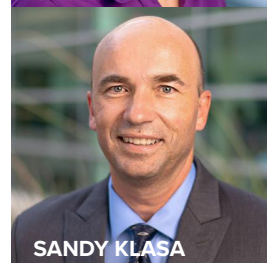
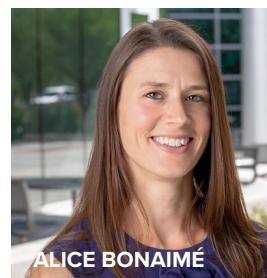
Andrea Rossi won a Dean's Research Award from the Eller College of Management in support of his prolific publishing during the academic year. He also published two papers at the *Review of Financial Studies* on mutual funds and systemic price fluctuations, and received references from various media outlets, including *CNBC* for a paper on hedge fund fees.

Scott Cederburg, associate professor and Sheafe/Neill/Estes Fellow in Finance, also published a paper which was co-authored with PhD student, Aizhan Anarkulova, on long term stocks in developed markets in the *Journal of Financial Economics*. This paper also was featured on the Harvard Law School Forum on Corporate Governance. A second paper on stock return predictability was accepted at the *Review of Finance*.

Thomas C. Moses Professor in Finance and Finance Department Head, **Kathy Kahle's** paper on corporate payouts was published in the *Journal of Financial Economics*.

Our faculty continue to be cited across the nation. *USA Today* and *Politico* cited **Kathy Kahle**, on her 2021 paper regarding California adding record numbers of women to their boards since the state set gender quotas, while *MarketWatch* cited her paper on corporate payouts. Associate Professor and Philip Rhoads Fellow, **Alice Bonaimé**, was referenced in a *Market Place* article regarding why companies repurchase their own shares. Together, both **Kahle** and **Bonaimé** contributed a book chapter on repurchases that will be published by Edward Elgar Publishing in the *Handbook of Corporate Finance* and was reviewed in the Columbia Blue Sky Blog.

Sandy Klasa, Anhauser-Busche Foundation Chair and professor, and **Alice Bonaimé** were appointed Associate Editors at the *Journal of Corporate Finance*. **Kathy Kahle** was appointed as At-Large Regional Academic Director for the Financial Management Association.





Taking a Gamble *Pays Off*

Giving back to the Eller College of Management is something that was always in the back of Brad Wolk's '95 BSBA (Finance) mind. After donating to Eller for many years, he wanted to give more and started asking himself "What does Eller need?" That was when he and his wife, Linda, learned about the need for new Bloomberg Financial Terminals and monitors in the Eller College Financial Markets Center.

"This is one of many projects we can hopefully help with over the years to come," says Wolk. "I'm very proud of Eller and the quality programs that are in place. I want to see that continue and our donations are a direct reflection of that desire for Eller's success to continue."

The new Bloomberg terminals will be available to authorized users within the Eller College which include faculty members and both undergraduate and graduate students and will provide comprehensive quotes, financial data and news on numerous companies, as well as data on equity, debt securities and markets.

"The Wolk's' generous gift allows the finance department to continue to enhance the opportunities and resources available to our students," says Kathy Kahle, Thomas C. Moses

Professor of Finance and finance department head. "Our success depends in large part on the support of our loyal alumni. The Bloomberg terminals are a great resource to our students and faculty researchers, and we're thrilled to have the opportunity to improve and expand their accessibility."

Wolk is the owner of Dry Pak Industries—a manufacturer of packaged desiccants selling to the food, electronics, pharmaceutical, nutraceutical, diagnostics, military and aerospace industries—where he oversees all operations, including production at their four factories, supply chain management and sales.

He started the company in 2002, when he was only 29 years old,

knowing that leaving his current job of five years was risky—especially with a second baby on the way. "The confidence I needed to start my own

"I would strongly urge any student embarking on their college career to get comfortable being uncomfortable and to challenge themselves. And my biggest piece of advice is to not be afraid to gamble on yourself."

—BRAD WOLK

business started with my education at Eller," he says. "I knew I had it in me and I decided to gamble on myself and my abilities. Ultimately, it was the best decision I ever made in my professional career."

Dry Pak Industries is now the fourth largest manufacturer of packaged desiccants in the U.S.

Alumni Profile

LEIGH WEISSHAUPT '00 BSBA (Finance)

For some, it's a personal statement that will get them a scholarship to their university of choice. For others, it's their grades. But for Leigh Weisshaupt '00 BSBA (Finance), it was a bird.

Weisshaupt grew up in Southern California and each summer, she and her family would take road trips across the Southwest that included stops at universities—one of them being the University of Arizona. "I fell in love with the University of Arizona campus the moment I set foot on it," says Weisshaupt.

Although she was also considering attending other colleges in the U.S.—like any other high school senior unsure about their future—Weisshaupt's attention was caught by a small bird sticking its head out of a saguaro near

Old Main. "It made such an impression on me that I wrote an essay for a scholarship about it and ended up winning that scholarship," she says. "So it felt like it was meant to be!"

Weisshaupt stayed in Arizona after graduation and has now worked at Intel for more than 20 years wearing different hats; from positions in finance to human resources to corporate services. Most recently, she became director of mergers and acquisitions integration for corporate real estate.

Weisshaupt has continued to be a big part of Eller since the time she graduated by participating in professional admissions interviews, hosting externships and has most recently made her mark by leaving Eller an estate gift with her husband Scott Bonar. The couple is also funding a scholarship and named it the Saguaro Scholarship, after the one moment that changed her life.



"The skills I learned from Eller and the time I worked in finance have been really valuable in a wide range of roles."

—LEIGH WEISSHAUPT

Benefactors April 2021-March 2022

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Jewish Community Foundation
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Meritage Homes Corporation
The PIMCO Foundation
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Endowment Program



Student News

2022 Meritage Competition

For the first time since the COVID-19 pandemic, Eller's annual Meritage Residential Real Estate Competition was once again in person.

This year's proposal was the impact of recent surging home prices and possible mortgage rate increases on housing affordability. Student teams had 15 minutes to present, following a five-minute round of question and answers.

The winning finance students for this year's competition were Alexandra Miller '22, Maria Siqueiros '22, Kaitlyn Sump '22 and Samantha Urias '22 taking home a \$4,800 prize. Teams that placed second and third won \$2,000 and \$1,000 respectively and fourth place received \$500.

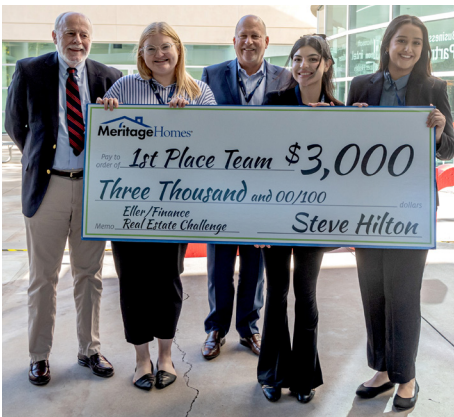
Steve Hilton '83 BSBA (Finance), executive chair for Meritage Homes, was a judge of the competition and has also been a long-time sponsor of the competition. This year he donated \$25,000 towards the competition. The panel of judges included professionals from, Iridus Capital, Diamond Ventures, Sharp Associates, DSW Commercial and others.



Eller Finance Students Reign Victorious at 2022 CFA Institute Research Challenge

A team of five finance students at the Eller College of Management—Madison Coder, Grace Keating, Ricky Wu, Austin Sobotka and Shuaib Joomin—led by Matt Haertzen, senior lecturer in finance—crushed the competition and placed first at this year's CFA Institute Research Challenge on February 8, 2022. This marks their third victory after wins in 2019 and 2020.

The annual CFA Institute Research Challenge is a global competition that provides university students with an immersive financial analysis experience. In teams, students research and analyze a publicly traded company and then prepare and present a research report with a buy, sell or hold recommendation. This year's competition was held in Scottsdale against ASU, NAU, UNM, UNLV and NM State. The students also attended the Phoenix CFA Society Market Forecast Dinner, at which they were able to hear from industry experts and network with the 300 attendees.



2022 Financial Modeling University Championship

The 2022 Financial Modeling University Championship (FMUC) was a hit with 1,147 students from over 100 universities competing from around the world. Of those 1,147, 163 were Eller students.

Seven individual Eller students qualified for the 50-person semi-finals and one team advanced to the 16-team finals, finishing in

fourth place. Brandon Jung '23 BSBA (Finance/MIS) represented the Eller College in the competition finals.

This competition, which will be renamed in Fall 2022, is an event designed to help students learn about financial modeling, get recognized for finance skills, and compete for a \$10,000 prize fund.

2022 Finance Graduation Breakfast



SPECIAL RECOGNITION

ALISON STINE '13 BSBA (Finance) graduated from the Eller College with honors and began her investment career as a Financial Advisor with AXA Advisors. After seven years with AXA, Stine went independent in 2020 and founded Stine Wealth Management.

Stine is very involved in the community. She is the Co-President of the PhoenixCats through the University of Arizona's Alumni Association.

Stine mentors through New Pathways for Youth, is the Vice Chair of the Women in Business Council through the Tempe Chamber of Commerce, Treasurer of Class 37 through Tempe Leadership, Committee Member of the Non-Profit KNOW Cares, Mentor through the Wildcat Mentor Society and a Member of the Eller Alumni Advisory Council.

She was recently recognized as a 2022 Under 40 in Wealth Management honoree, 2022 Most Admired Leaders from the Phoenix Business Journal and was a finalist for Businesswomen of the year for the Tempe Chamber of Commerce.



Meet our Students



“I stand on the shoulders of giants. I would not have been able to get to where I am without the help of the amazing faculty and my fellow PhD students at Eller as well as the support from my family.”

SCOTT JONES '22 PhD (Finance)

Scott Jones knew he wanted to get his degree at the University of Arizona, because he knew the quality of education he would receive from some top scholars who were not only extremely talented, but also incredibly approachable.

His dissertation, “Essays on Stock Market Participation” looks at some reasons why certain groups of people have less stock investment behavior. With a focus on debts influencing decision making and crime, in particular hate crime, affecting investment decisions, he hopes to research key influences that affect a lower participation stock market investments. He looks forward to continuing this research at The Paul and Virginia Engler College of business at West Texas A&M University and is especially excited about the large amount of data and resources that will be available to assist him in his research at this institution.

His best advice to those looking to earn a PhD from the Eller College of Management is to put in the hours. “It can be a lot of work, and tiring, but every hour you are working is one hour closer to getting a good position at a great university. Never stop. Once you stop, it’s easy to stay stopped.”

EDUCATION:

PhD in Finance, University of Arizona, 2022

Master’s in Financial Economics, Utah State University, 2016

BS in Economics, Utah State University, 2015.

“Completing the PhD program is the hardest thing I have ever done. I don’t think life will get any easier, but I feel that I am now stronger and better prepared to face life’s difficulties because of the things I learned as a PhD student.”

“While I am excited to start the new chapter of my life in Texas, the friendships I have made and my time (in Tucson/at Eller) will always have a special place in my heart.”

“I challenged myself that I was going to take classes like Financial Modeling, because my skills could be better, so I wanted to make sure I came out with skills I needed. I spent a lot of time in office hours, but I came out with what I needed to take some of the more challenging advanced classes.”

COURTNEY WHITLEY '21 BBA (Finance) '23 MSF

“My first year at Eller was rough. I did poorly on my first exam because I was exhausted, although I did end up getting an A in that class. But now, my degree and education resonates with me and I know that I’m meant for finance, but it took a while for me to know this was what I should do.”

“Resources can be found anywhere. Spend time with the people who have the information. Listen. Pay attention to signs, research your own stuff, look up programs, go onto websites and see what they offer, and the worst they can say is, ‘no.’ You figure out who has what, and you use them. You can find places that fit, or you can adjust what you need to make it fit. If you are willing to put the effort in, a lot of people won’t say no.”



After graduation, Courtney moved into wealth management as a research analyst. She has goals to earn her CFA in the future.

FIVE FUN FACTS ABOUT COURTNEY

1. Enjoys 100 Grand and Payday candy bars.
2. Worked as a fire fighter in rural Tucson.
3. Once did a triathlon just to make sure she could still swim and ride a bike.
4. Was a state swimmer in High School – her favorite stroke is the breaststroke. Her son is following in her footsteps as a state athlete and she is very proud!
5. First vacation, once she gets a chance, will be to the beach. Any beach.



KUNAL SHAMDASANI
'23 BSBA (Finance/MIS)

“Coming into Eller, I was worried about the business program being cutthroat. But everyone here is willing to help each other. I think that’s something unique to this particular school. I had friends go to other schools and you hear about how you must step on someone’s back to get ahead, and I never felt that way here.”

“I think in the long run, professionals that educate themselves in finance have a great deal of importance to help the people who don’t have the fortunes to understand finance as a whole, to help them understand how to manage their finances as well as how to avoid those circumstances.”

“The Wall Street Scholars program has been such a big part of Eller for me, and I got rejected from the final round on my first attempt. I was a freshman and getting to the final round was a big deal but getting rejected was important. I knew I wanted to pursue finance, so the next year, without being part of the program, I did it naturally. Having that drive without someone instructing you to do it is far more valuable than having it reinforced all the time. I came back very well prepared, and the directors were helpful even when I wasn’t in the program.”

Kunal will be interning with Bank of America this summer, which he’d like to convert to a job offer. He’s working with their natural resources group in Houston, and he cannot wait!

FIVE FUN FACTS ABOUT KUNAL

1. Kunal is very fast, running a 4.8 40-yard dash. While he has since lost some speed, he’s still willing to challenge the average person to a footrace.
2. His elocution is impeccable, and he’s willing to take on any tongue twister.
3. He speaks five languages fluently, and English is his third one.
4. He loves travel and has been to 30 countries and 10 U.S. states so far.
5. When he was very young, he wanted to be an astronaut.

KATE MARTIN '23 BSBA (Finance), Law

“Anytime I walk through the PDC, I’m surrounded by people I know from classes and professors who have helped me a ton. I always have a ton of support from clubs and mentors and people in general. That’s something that has kept me to stay involved on campus. I value the mentorship community and the supportive and happy people.”



Kate is interning with the Blackstone Group this summer with their private credit origination group. She would be very excited to convert that to a job offer within credit/distressed investing. She’s the first person from Eller to get into Blackstone.

“Investing is very important because you have an impact on the direction of the economy and the country. What money goes to is what does well, so if you put money into something, it’s going to succeed. In my career, I’m going to try to funnel money to things I think should succeed, such as renewable energy.”

FIVE FUN FACTS ABOUT KATE

1. Enjoys knitting and likes to make Nordic sweaters
2. Started the Women’s Committee in Wall Street Scholars Program.
3. Kate is a dual citizen with Great Britain.
4. Kate loves playing the piano, and often sneaks into the music rooms on campus.
5. An excellent tennis player, Kate was ranked #32 in Texas for women in the height of her playing.

INVEST IN FINANCE eller.arizona.edu/finance

Your commitment to invest in the future of the Department of Finance helps us advance and grow.

Meet our Students



KELSEY WALCOTT '21 BSBA (Accounting) '22 MSF

“I was lucky enough when I first got to Eller that I had a lot of people who believed in me, more than I believe in myself. I truly believe that everyone is capable of amazing things if you let yourself accomplish them. I wouldn't be where I am today without the mentors I found in Eller, because they saw potential in me even when I didn't.”

“I feel like my classmates are my siblings; we spend so much time together. It's obvious the people at Eller love what they do, and it's important to them to foster their passion in their students. That shows in the Eller Experience”

After graduation, Kelsey will be an Associate Finance Analyst with Google. She'll spend time in the different finance teams, learning about the company and where she'd like to fit in.

FIVE UNIQUE THINGS ABOUT KELSEY

1. Has two cats, Peanut and Pepper.
2. She's a fitness enthusiast and worked in a boxing gym for several years.
3. Spent a lot of her younger years traveling internationally with her dad on his business trips.
4. Has a habit of reading as many *Wall Street Journal* articles as she can.
5. Loves reptiles and has a unique skill of catching frogs and lizards.

DAVID AKAHAR '23 MSF

“When I got here, I had so many self-doubts about whether I was going to be able to go through the program or not. Once I started, I discovered everyone is willing to help. If you ask for help from the faculty, they are willing to give you extra attention and make sure you understand the concept. Some are willing to go even deeper for your personal development.”

“In my country, you have the preconception that everyone in the United States works alone and minds their own business. When I started working here, I found that was not the case at all. In fact, the work environment is very lively, and everyone tries to make you feel comfortable. They try to strike a conversation, so it was more of a family type thing. I really enjoy that at Eller.”

“Applied Portfolio Management ties together my goal, which is to manage money. The class is tough, and the professor pushed my limit. I didn't appreciate that until the second semester, and now I realize I did myself a favor by sticking around. I'm really seeing dividends, and in the trading competitions, I'm always at the top.”

David will be graduating in December 2022 and hopes to spend three years in the United States working in fund management or portfolio management. After gaining that practical knowledge, he hopes to return to his home country and start a business helping people who don't currently have the opportunity to have someone professionally manage their money. He is very proud of his activities at the University of Arizona, and is leaving his mark as a member of the 2022-2023 Student Fee Advisory Board and a Graduate Assistant in the Dean of Students office.



FUN FACTS ABOUT DAVID

1. He is a really good cook. Jollof rice is his go-to dish.
2. He finds novels calming, and prefers to read over movies and television.
3. He is addicted to trading, and looks at charts all the time, even when the markets are closed.
4. Attending the Maritime Academy of Nigeria for secondary school taught him discipline, which helps him face challenges as he's honed his ability to focus and persist.
5. He wanted to be a farmer growing up and had chickens as pets.



MADISON CODER

▶ **OUTSTANDING FINANCE
SENIOR AWARD, SPRING 2022**

MAJOR: Finance

A LIFELONG PASSION: “Dancing is my number one. I was a competitive dancer my whole life until I got into college. I still love to dance and stay connected with the dancing community.”

A PROUD ACHIEVEMENT: Madison was the first University of Arizona student to be part of the Girls Who Invest Program. Looking for opportunities for growth while remote during COVID-19, she was able to earn several niche and exciting certifications in the program that have given her a leg up in her career.

KEY ACCOMPLISHMENT: Madison refused to allow a rejection on her first try to the Wall Street Scholar’s program stop her. After spending a year preparing, she was able to secure her spot in the program her sophomore year. “If I can get into this, I’m not going to let anything else stop me. This is where I’m meant to be.”

FAVORITE THING ABOUT ELLER: The professors are willing to be there and talk through things both inside and outside the classroom. Everyone is approachable, and the network that was built around Eller is incredibly valuable.

UNWINDING TIP: After her obligations are fulfilled, you can find Madison relaxing with a long overdue Netflix binge.

NEXT STEP: Heading to New York City to join the J.P. Morgan Asset Management Division and hopefully working her way into becoming a client advisor.

Student Award Winners

TANNER BRYSON

▶ **2021-22 Fielding-Singh
Award (Finance)**

MAJOR: Finance and
Entrepreneurship



LONG TERM CAREER GOALS: Tanner would like to work his way into a leadership position where he has enough responsibility and autonomy to effectively be running his own operation – and one day own his own business.

OVERCOMING CHALLENGES: “I came into the job hunt a little too confident at first. Then I realized it’s not as easy as I thought. I got some hard ‘No’s.’ And then I ended up with something that’s a perfect fit. It took more work than I expected, but I’m better for it.”

PROUD MOMENT: Getting into Eller Admissions with Excellence. Getting accepted into Eller early with a first choice of major felt good and was a big accomplishment.

ADVICE FOR A FUTURE ELLER STUDENT: Eller is what you make it. You can be the student that would go through the motions and be average, and that’s fine. Eller gives you the opportunity to excel, and if you do, Eller reciprocates by putting you in touch with the right people. Give it your best and try to excel, and you’ll see the benefits Eller can provide.

A FAVORITE HOBBY: As a big movie buff, Tombstone is the most quotable movie he knows. He’s also very active, and you can often find him on the basketball court.

POST-GRADUATION PLANS: Work with the Wentworth Property Company, a commercial real estate developer out of Phoenix.

Student Award Winners (CONT.)



LUKE GALLAGHER

► 2021-22 FIELDING-SINGH AWARD (FINANCE)

ADVICE FOR A FUTURE ELLER

STUDENT: “What you do after graduation doesn’t have to be what you do for the rest of your life. Get somewhere that will launch you in the direction you want to go when you figure out what that is.”

ELLER APPRECIATION: The student led mentorship, like the Wall Street Scholars Program and other Eller leadership groups is fantastic. He learned a lot of skills, developed a ton to talk about and became connected with great people.

AN EXCITING ACCOMPLISHMENT:

It took months of intense preparation, including participating in Wall Street Scholars Program, Alpha Kappa Psi

and building his resume and skills, but Luke finally got a first-round interview with Barclays and then a subsequent internship offer. It was amazing to land a great internship after over a year of preparation.

A FAVORITE HOBBY: As a fan of old movies, Luke recommends “Rear Window” and “Dial M for Murder” as must-see films.

NEXT STEP: Relocate to New York to work at Barclays as an Investment Banking Analyst.

MAJOR: Finance and MIS

A PASSION: Luke loves to get outside. Hiking is one of his top choices, and he spent a weekend his senior year hiking the Grand Canyon to the base and back.

ROWEN FLETCHER

► 2021-22 FIELDING-SINGH AWARD (FINANCE)



A START IN FINANCE: Rowen was fascinated by markets, global markets and trade ideas. After joining the investments club, he spoke with the students who advised him to start networking and join the Wall Street Scholars Program.

DEFINING ELLER MOMENT: “The end of Freshman year, I was elected to be vice president for Finance for Eller Impact. It gave me something I could put on my resume. It was my first step up from going to clubs and classes and my first leadership position.”

COMPETITIVE SPIRIT: Rowen ran the Tucson Marathon in 4 hours and 1 minute. He plans to run more marathons, and shave that minute off the time!

PROUD ACCOMPLISHMENT: Being one of the founding members of the Financial Modeling Club. One of the toughest things he had to do was convince students to come to the club meetings on zoom after a day of class on zoom. Coming back to club meetings in person was a fulfilling experiences.

NEXT STEP: Rowen graduated undergrad in three years. He’s pursuing the University of Arizona Accelerate Master’s Program to earn his Master of Science in Finance. He’ll also be doing a summer internship with JLL in commercial real estate.

MAJOR: Finance

EARLY CAREER PLANS: Growing up, Rowen wanted to be a baseball player for the Pittsburgh Pirates.

JACOB BRANDT

► 2022 FINANCE
DEPARTMENT HEAD'S
AWARD

MAJOR: Finance

ELLER APPRECIATION:

The people at Eller and connections aren't strictly within a major, so different perspectives are given.

The connectivity from the first semester of Eller is very strong, and it builds a network that doesn't feel small.

VISIONS FOR THE FUTURE: "Progress is good. You know that stereotypical vision of the future? I think that future should be now. I don't see why it can't be a possibility, especially if we go toward renewable resources and commercially maximizing output, especially in a world full of limited resources."

ADVICE FOR AN ELLER STUDENT: Become a resource for other people, and you can learn more and contribute to the learning environment.

NOTABLE ACTIVITIES: Jacob enjoyed the Financial Modeling Club, and David Brown's modeling classes. Applying concepts into club activities and participating in the Financial Modeling World Cup have been worthwhile activities.

UNWINDING TIP: After finishing all his obligations, Jacob enjoys fencing and visiting St. Phillip's Plaza.

NEXT STEP: Interning at KPMG during the summer doing tax economic valuation, then earning his Master's in Applied Analytics at Columbia University in New York City.



ASHLYN TUCKER

► 2021-22 FIELDING-SINGH
AWARD (FINANCE)

MAJOR: Finance with a
communications minor

EARLY ASPIRATIONS: "I thought I wanted to be a lawyer because I love banter and convincing people to my side. I also wanted to be a marine biologist at one point, because I realized I liked the idea of hanging with sea animals more than I liked the idea of studying pH levels."

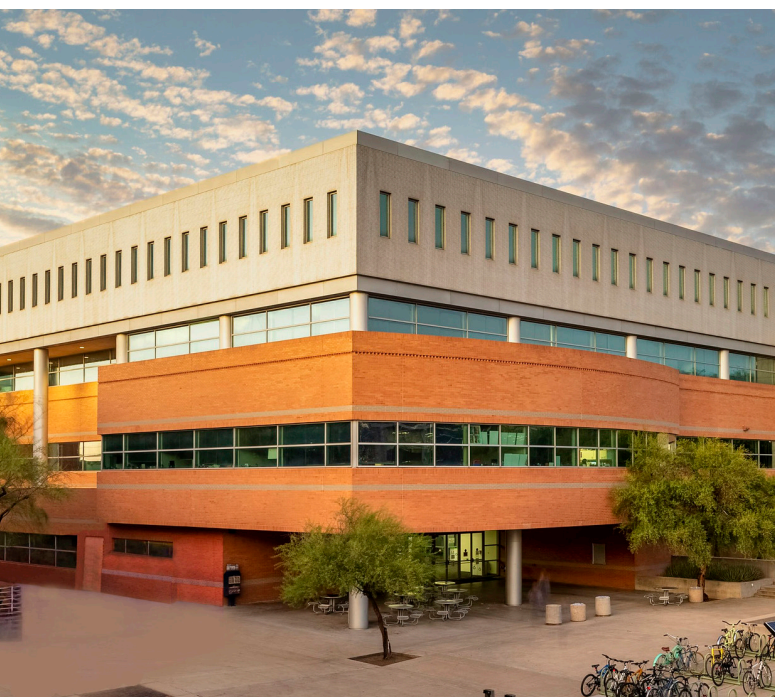
FAVORITE ACTIVITY: Ashlyn loves endurance sports and working out. "I find when I push myself at the gym, that translates over into pushing myself at my career and professionalism."

ELLER APPRECIATION: The humility and willingness of the professors to give back to students that show work ethic and dedication is great. The accessibility of the professors and staff really sets Eller apart.

MOST EXCITING EXPERIENCE: Winning the Fielding-Singh Award as a third year student. Jumping ahead and being honored with a select award within the group is an amazing accomplishment.

UNIQUE SKILLS: At the age of 13, Ashlyn started a food blog and gained a following creating recipes, food styling and photography. She's translated these unique skills to giving her an edge in the finance industry by being creative and excellent at presenting.

NEXT STEP: Ashlyn is pursuing a Master of Science in Finance through the University of Arizona Accelerated Masters Program, and hopes to earn her CFA level one after interning with Vanguard. She hopes to work in wealth management after her master's.



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Save the Date!

Eller Finance Alumni Reunion

Friday, October 28
2-5 p.m. | McClelland Hall

Join us during the University Homecoming festivities for a reunion with all Finance alumni. This is your chance to connect with fellow alums, hear from Department Head, Kathy Kahle, and reminisce about your times at Eller.



Invest in Finance

eller.arizona.edu/finance

Your commitment to invest in the future of the Department of Finance helps us advance and grow. Contributions may be made to the Department Discretionary Fund and the Don Seeley Fund for Excellence in Finance.