



Undergraduate Women’s Investment Network

FEBRUARY 2022

## The Loomis Sayles Undergraduate Women’s Investment Network

By Shannon O’Mara, CFA, VP, Credit Research Associate Director & Founder of UWIN

The poster that hangs in my daughter’s room says, *“Always remember that you’re braver than you believe, stronger than you seem and smarter than you think.”* After what we’ve all experienced over the last couple of years, I can confidently say that we have all been very brave in the face of ongoing uncertainty, stronger than I could have ever imagined, and so very smart to not only persevere but succeed in creative ways. It certainly has not been easy - both personally and professionally - as lives and normal routines have been disrupted and we’ve navigated uncharted waters. I am so proud of how we have learned to adapt. We have found ways to meaningfully connect and learn from each other while staying true to the mission of UWIN, which is to **inspire, develop and recruit undergraduate women for investment management careers through mentorship and internship opportunities.**

After quickly shifting to a virtual recruiting season during spring 2020, we successfully executed the 2020-21 program fully remote, including facilitating nine technical and development workshops with the 39 students from 13 schools. I was then very pleased to welcome 36 students to the 2021-22 program in September 2021. These students hail from 16 colleges and universities in the Boston area, generously defined as stretching from Western Massachusetts, to Connecticut and Rhode Island, to the city and suburbs of Boston! Our program reach is extending; we now count about 200 women who have participated in the UWIN program since 2015! I’m forever grateful to the dozens of colleagues and external partners who facilitated our professional development and technical training workshops, supervised our interns and mentored our students.

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The students who consistently show up and engage throughout, given that the ground seems to shift underneath our feet every few months as the pandemic bobs and weaves, continue to impress me. Just check out the **Good News** section on pages 7 and 8 of this newsletter! Students have landed impressive internships, graduates have secured full time roles within investment management, and UWIN alums are paving their way in the corporate world. At Loomis Sayles, **we are fortunate to count five UWIN alum among our colleagues with two more joining the firm** after their May 2022 graduation! I enjoy hearing from both current students and alums. A few of those comments received over the last few months:

- *I wholeheartedly believe that my success in the recruiting season is due to UWIN and would be happy to help anyone else in the network through interviewing prep, coffee chats, whatever. I appreciate everything that Loomis Sayles has done for me!*
- *Being part of the program this past year has helped me develop my professional skills and given me the skill set to be successful in any career I pursue in my future.*
- *Thinking back to who I was about a year ago when I applied, I have changed so much since then and attribute most of it to the UWIN program. I appreciated being able to explore different aspects of investment management and the opportunity to meet with employees on different teams, such as trading and credit research. While it would have been great to meet everyone in person and go to the office, I think the remote environment was executed well and was still very beneficial.*
- *While I went into the program with absolutely no idea what type of finance I wanted to pursue, I can confidently say that I have a more clear understanding of what I am looking for in my future career. In multiple interviews, I have used this experience as an example of what I am looking for in a future role: one where the employees support the growth and learning of each other and are always there to help when needed. I genuinely believe that the UWIN program strongly prepared me for these opportunities and I am super excited for my future career.*
- *This program has taught me so much.... It helped me find my confidence as a woman of color in finance.*

This feedback and these comments overwhelm me and importantly validate the value and power of the UWIN program. That said, we are just getting started to seed the pipeline of diverse talent into the investment management industry. **Diversity is a business imperative and strategic priority for Loomis Sayles and our collective success.** Thus, our senior management, colleagues and I remain steadfast in pursuing the mission of UWIN. Please reach out to me if you would like to learn more, get connected or volunteer. We need your help to change the face of the industry. We (still) need more women.



## STUDENT SPOTLIGHT

### TALIA VINCENTE

UWIN Program: 2021-2022

Bryant University, Class of 2023

Majors: Economics and Finance

Mentor: Roger Ackerman, VP, Investment Director



Talia interned with the Global Bonds team where she worked with Kent Lam, Heather Ridill, Scott Service and Lynda Schweitzer during the fall semester of 2021. Talia focused on developing skills related to financial analysis, which she applied to her projects including ESG and sovereign analysis. Her goal for the internship was to learn as much as she could about finance and investment management. This was accomplished by contributing to a wide variety of projects for the Global Bonds team, as well as meeting people in different positions and teams within the company. Her favorite parts of the internship were speaking with very knowledgeable and experienced investment professionals and learning the corporate culture.

Her advice to current and future interns is to **reach out to and connect with as many people as you can. If you can send an email asking for 30 minutes of someone's time to learn more about their role at Loomis Sayles, they will give that to you and then some.**

Talia's family is in the Massachusetts and Rhode Island area, and she grew up in Dighton, Massachusetts. In addition to her hobbies of rowing crew and practicing yoga, Talia is the president of two organizations on campus: The Women's Network and DECA.

***“Our intern experience with Talia reinforces our support and commitment for the UWIN program.*** Talia managed her time well and was extremely well-organized despite taking on multiple projects from various team members. She displayed great enthusiasm and diligence. She was not afraid to speak up during team meetings and asked thoughtful questions.”

**Kent Lam, CFA, Product Management Analyst**



### THE MISSION

Inspire, develop and recruit undergraduate women for investment management careers through mentorship and internship opportunities

## ALUMNA SPOTLIGHT

### TAVLEEN ARORA

UWIN Program: Mentorship 2020-2021

Babson College, Class of 2021

Major: Finance

Mentor: Marianne Winkelman, Director of Global Bond, EM and FX Trading



Tav was a mentee in the UWIN program during her senior year. She worked closely with her mentor to manage professional relationships, navigate the dynamics of a team, learn about different finance paths by connecting with various Loomis Sayles employees and prepare for interviews with her now full-time employer, Millennium Management. She credits the program for helping her gain the confidence and opportunity to reflect on how to be successful in the finance industry. Tav is currently doing a secondment with UBS' Equity Research division on the Consumer and Industrial teams through June 2022 and will then join the Millennium team in July 2022.

Tav shares, "The UWIN mentorship program gave me the opportunity to think consciously and mindfully about my career and the steps I wanted to take in order to be successful. In addition, I was able to explore what success meant to me, which allowed me to seek mentorship and guidance from other like-minded professionals in the industry."

Tav resides in New York City. She enjoys coaching basketball to young girls on the Upper East Side on weekends!

"Being able to experience the UWIN program as a first year mentor has been a rewarding experience. I went into the program expecting to be a sounding board for my mentee and provide guidance as she begins to prepare for a potential career in finance, but *I soon realized that this program is mutually beneficial*. It has been great to see my mentee gain confidence and comfort in telling her story as well as start to expand her network."

Jack Celata, VP, Senior Fixed Income Trader

"I truly enjoy my mentor relationships and have found the experience to be mutually beneficial. *It's rewarding to help UWIN mentees navigate the investment management industry and discover where their interests and skill sets fit*. I've enjoyed staying in touch with my mentees past the program, watching their successes and helping along the way!"

Heather Ridill, CFA, VP, Global Credit Strategist

# INSIDE A MENTORSHIP

## Elizabeth Spalla

Boston College, Class of 2024  
UWIN Program: Mentorship 2021-22

## Emily Sweet

UWIN Mentor  
CFA, VP, Associate Investment Director



### **How often and where do you typically meet?**

Emily: Elizabeth and I meet for an hour once a month by video chat. We have a recurring monthly meeting scheduled. This standing meeting helps keep us on schedule, even if we change meeting times from month to month.

Elizabeth: Emily and I typically meet during the last week of the month. Even though we are in a virtual setting, it still feels personal because we each block off this one-hour period in our schedules so that we can connect and recap about what has happened during the past month. It has been great getting to know Emily this way.

### **How do you prepare for your mentorship meetings?**

Emily: Elizabeth sends me ideas for discussion in advance of our meetings. This helps get the conversation started and has led to some interesting discussions about investment clubs, career exploration, course work and networking.

Elizabeth: While we cover a whole host of topics during our sessions, Emily and I tend to discuss more of what is going on in our professional and academic lives, and how this relates to the macro economy. I really value her personal input and advice. One major project I was working on back in the fall was a pitch deck for an analyst application through the Boston College Investment Club. This was by far my toughest assignment, but one of my proudest moments as well. We discussed how this experience is something that I wanted to continue working on because it was an area that truly interested me.

### **What skills has your mentor shared with you?**

Emily: I've encouraged Elizabeth to explore lots of areas of the investment industry, avoiding the natural tendency to focus on areas that are most familiar or popular.

### **How have you applied what you learned from the mentorship in your coursework?**

Elizabeth: One of the greatest pieces of advice from Emily is to be open to exploring career paths that I would not have previously considered. This has been a great way for me to expand my network by talking to individuals in different career paths and learning about their individual experiences in that role. This ended up working to my advantage as I had a final group project in my organizational behavior class surrounding motivations and incentives at an organization. My group chose the Boston College CSOM faculty members, and I had the opportunity to speak with six members across the school. Keeping Emily's advice in mind, I spoke with each member about their career paths prior and coincidentally one faculty member connected me with alumni in his field. Since then, I have been continuing this conversation and relationship to explore a new potential career path. I am so grateful that I had this opportunity and I took Emily's advice to have those unexpected conversations.

### **What makes a successful mentorship?**

Emily: Commitment to meeting regularly helps build a respectful relationship, and planning topics of discussion helps keep conversations focused. From the mentor's perspective, important attributes

include a willingness to listen, share and avoid unsolicited suggestions. From the mentee's perspective, attributes include a willingness to share, ask for help and consider new ideas.

Elizabeth: Three things have made my mentorship with Emily successful:

**Create a schedule.** Finding a time to meet each month allows us to both prioritize each other's time and be respectful of our busy schedules. This has also allowed us to collect our thoughts and set an agenda for each meeting.

**Get to know each other.** One of the challenges of a virtual environment includes creating a personal connection over a screen. However, one of the ways that we have been able to further connect is by catching up at the beginning of each meeting, with life updates and just generally how we are feeling as the months have gone on. As simple as this sounds, it has been a nice way to see each other as people and not just as two people talking for an hour about finance.

**Get excited.** I think that some of our best sessions have been those where we have projects going on in our lives that we are truly passionate about and excited to share. As a student, it is exciting being able to share my accomplishments with someone who was once in my shoes and has built a career from this. I also live with mainly science majors so it is nice talking with someone who is also passionate about this field.

## MENTOR. RECRUIT. WIN.



## Loomis Sayles: Commitment to **Diversity, Equity, and Inclusion**

"I learned about UWIN roughly five years ago before coming to work for Loomis Sayles. I was so impressed with the program that I, with help from Shannon O'Mara, introduced UWIN to several executives at the Federal Reserve Bank of Boston and a roundtable of CEOs in the financial services industry. Even through this pandemic, **UWIN continues to introduce talented female college students to investment careers at Loomis Sayles** and other companies in Boston's asset management and broader financial services industry. **UWIN is an amazing asset and a wonderful example of leadership helping to advance DEI at the firm and in** the Greater Boston Business Community - and I am proud to be among its many champions, fans and supporters!

At Loomis Sayles, we advance DEI by promoting four key priorities focused on 1) governance and alignment, 2) representation, retention and recruitment, 3) communications and 4) courageous conversations. While UWIN's influence last year primarily advanced DEI Priority number 2 (representation, retention and recruitment), the program's presence also impacted DEI priority number 4 (courageous conversations). Different elements of how UWIN helps advance the firm's DEI strategic focus areas is clearly evident over the last seven years:

**Workforce** (through hired UWIN participants), **Workplace** (through the many staff engaged in supporting UWIN as an advisor or mentor), **Marketplace** (through UWIN participants hired by other industry firms) and **Community** (through the amazing partnerships UWIN has with local colleges and universities). LS' DEI wins through UWIN!"

**Marques Benton**, VP, Chief Diversity, Equity and Inclusion Officer

# GOOD NEWS: Jobs, Internships, Changes & Life Events!

## Graduates Launching Careers in 2022

- Kate Asaro - John Hancock
- Megan Giambanco - Loomis Sayles
- Marisa Li - JP Morgan Asset Management
- Rona Mejiritski - Nike, Inc.
- Meredith Mongeau - TJX Companies
- Haley Obermeier - FTI Consulting
- Devika Naik - Red Ventures
- Tanvi Rane - Citi
- Nadia Son - Loomis Sayles
- Emma Taylor - RSM
- Miruna Vlad - Citi
- Claire Xie - PIMCO

## Incoming Summer 2022 Internships

- Victoria Chan - JP Morgan
- Alana Chernyak - Fidelity Investments
- Stephanie Chiasson - Scotiabank
- Ashley Choi - Perelson Weiner
- Emma Diianni - MUFG
- Shaelyn Fitzgerald - Loomis Sayles
- Kaitlynn Giombetti - Deloitte
- Victoria Hodgkinson - Bank of America
- Martina Jankovic Chin - Goldman Sachs
- Kimberley Kimura - Wells Fargo
- Ai-Quyen Le - John Hancock
- Marie Maher - Fidelity Investments and Online Intensive Scholar for Girls Who Invest
- Nina Radman - Henkel and Online Intensive Scholar for Girls Who Invest
- Emily Shal - Citi
- Victoria Silva - RBC Capital Markets
- Isabella Wu - Bank of America

## Alumni Happenings

- Courtney (Gregory) Allaire got married in 2021 and recently started the MBA program at Bentley University.
- Tavleen Arora started coaching basketball to girls ages 9-14 in NYC.
- Nicole Baltazar completed her masters in accounting, recently joined Ernst & Young and is now studying for the CPA exam.
- Gianna Capo completed the first rotation of Citizens Bank's Commercial Banker Development Program and recently started the second rotation with the Commercial Real Estate group in California.
- Ke Xin Chen recently joined Alcentra in NYC after spending more than two years at BlackRock.
- Amanda Dellicolli graduated in December 2021 and will complete her master's degree in finance in May 2022.
- Catherine Ferri joined Loomis Sayles in Credit Research in August 2021.

*“Without the program, I do not think that I would have ever explored this area of finance and wanted to express how appreciative I am for you taking a chance on me at the start of my college career.”*  
**UWIN 2019-20**

*“The UWIN program never ceases to amaze me.”*  
**UWIN 2015-16**

- **Karolina loukhnikov** joined Criteo after spending two years at TCAA as a Digital Account Coordinator, and she's engaged to be married in October.
- **Nicole Konikow** received the SHRM-CP Certification and was promoted to Director of People Operations at Nanoramic Laboratories.
- **Deanna Leung** recently started her Fulbright Fellowship in South Korea where she will be an English teacher in a high school as well as a cultural ambassador for the U.S. More information can be found on this [Bentley article](#).
- **Ariana Lucera** completed the investment management rotation program at MassMutual and accepted a new full time role on MassMutual's newly formed Impact investing team.
- **Gaya Mahadewi** was recently accepted into NYU's Tandon School of Engineering for their master's program in Management of Technology.
- **Gaëlle Mbaye** welcomed a baby girl in November 2021 named Amy who joins big sister Kany.
- **Chrissy Norton** is completing the Professional Development Program at State Street with her fourth and final rotation on the Investment Strategy and Research team.
- **Glenys Rodriguez** recently moved to Dallas, started as an associate at Goldman Sachs and got married.
- **Francesca Tossona** was recently promoted to analyst at Wellington Management on the Competitive Intelligence team, passed Level 1 of the CFA exam and adopted a dog named Henry.
- **Isabella Wu** is attending the Kellogg School of Management and will receive a certificate in Managerial Analytics alongside her undergraduate studies.

### Student News

- **Shaelyn Fitzgerald** is studying in Florence for the spring 2022 semester.
- **Victoria Hodgkinson** was elected to serve as the macro sector co-head for the Connecticut College Peggotty Investment Club, and she's looking forward to studying abroad in Seville, Spain this semester.
- **Ridha Mirza** is studying in Budapest for the spring 2022 semester.
- **Victoria Silva** has been elected president of the UMass Amherst Minutemen Equity Fund.

\* If you have good news to share, we'd love to hear it. Email us at [UWINinfo@loomissayles.com](mailto:UWINinfo@loomissayles.com).

[https:// www.loomissayles.com/website/about-us/undergraduate-womens-investment-network](https://www.loomissayles.com/website/about-us/undergraduate-womens-investment-network)

"I volunteered to be a part of this program as *I believe there needs to be better pathways for women into the field of finance and investment management*. Coming up as a female research analyst I did not have many women to help mentor me, so I am doing what I can to change that. My mentee is extremely bright, curious and anxious to learn as much as possible, which has made this experience very rewarding for me. I am excited to continue watching and helping her grow as she looks forward to what I expect to be a successful career in our industry."

Leigh Pressman, CFA, VP, Equity Analyst



## UWIN 2022 – 2023 RECRUITING DATES

February 1, 2022: Application opens on the Loomis Sayles careers website:  
<https://www.loomissayles.com/website/about-us/search-jobs>

February 23, 2022: UWIN Information Session:  
<https://info.loomissayles.com/uwin-rsvp-2022>

March 7, 2022: Applications due

March 14-30, 2022: Candidate interviews conducted

April 15, 2022: Decisions communicated

**In order to be considered for the UWIN program, you must provide an application, a resume, cover letter and an unofficial transcript.** Applications are available on the careers section of the Loomis Sayles website beginning February 1, 2022.

## UWIN LEADERSHIP

**Shannon O'Mara**, CFA, VP, Credit Research Associate Director - Founder of UWIN and Program Leader

**Andrea DiCenso**, VP, Portfolio Manager & Strategist - UWIN Advisor

**Tricia Keefe**, VP, HR Business Partner - UWIN Mentorship Program Coordinator

**Steve Hoppe**, VP, Senior Fixed Income Trader - UWIN Mentorship Advisor

**Kristy Keenan**, VP, Associate Investment Director - UWIN Internship Program Coordinator

**Marissa Neill**, VP, Administrative Manager - UWIN Marketing & Recruiting

**Marianne Winkelman**, VP, Director of Global Bond, EM & FX Trading - UWIN Advisor

**Erika Fallon**, Senior Administrative Assistant - UWIN Events Coordinator

**Zoe Calianos**, Senior Credit Research Associate - UWIN Internship Program Coordinator

**Kristen Moldovan**, Credit Research Associate – UWIN Intern Advisor

## CONTACT US

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