

FEBRUARY 2023

UNDERGRADUATE WOMEN'S INVESTMENT NETWORK

News, program updates, student spotlights,
mentorship program, & much more!

A Note from the Founder

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

After managing the Loomis Sayles Undergraduate Women's Investment Network (UWIN) program virtually for 2+ years, it's been so wonderful to be back together, engaging and connecting in the same space. Despite the challenges of the pandemic, UWIN continued to make progress in its mission to inspire, educate and recruit undergraduate women into investment management through internship and mentorship opportunities. Just look at our good news on pages 11-13! I'm pleased to share that our UWIN alumni now total almost 200, and with this year's group of participants, we'll soon be at 220. We've also expanded our reach to include more schools; new this year is Harvard College after welcoming students from Stonehill College and Tufts University last year.

As we continue our journey, we embrace the motto of the University of Rochester, my alma mater, "meliora" which means "ever better," as we strive to effectively adapt to this hybrid world and serve and engage the Gen Z population entering the workforce. We now host a mix of virtual and in-person development and technical skills workshops throughout the school year. We've also made efforts to stay better connected in the world of social media with the launch of an Instagram page. Please follow us at [@UWIN_LoomisSayles](https://www.instagram.com/UWIN_LoomisSayles), where you can find highlights of the program, spotlights on UWIN participants and alums, updates on our workshops, and advice for young women interested in careers in investing. We look forward to seeing you online!

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Undergraduate Women's
Investment Network

To help sustain the connection of our growing network of more than 200 women, many of whom are pursuing careers in investment management, we launched the Inspiring Speaker Series in 2022 which provides a forum to maintain connection between UWIN participants and Loomis Sayles. The UWIN program partners with Loomis Sayles employee resource groups to host speakers who provide unique perspectives in their areas of expertise. In November, UWIN teamed up with our Women@Work Early Career Professionals group to co-host Susan MacKenty Brady, CEO of the of The Simmons University Institute for Inclusive Leadership, who shared perspectives from her best-selling book “Arrive and Thrive,” specifically investing in your best self. One UWIN alum shared with me, “The webinar with Susan was excellent! I have pages of notes and feel empowered to bring my best self to the table!”

In early 2023, UWIN teamed up with the firm’s Mentorship Program to host Rosina Racioppi, CEO of WOMEN Unlimited, Inc., who shared her insights on the importance of developing relationships, networks and mentorship opportunities, drawing from her book “Relationships Matter.” Follow our [UWIN Instagram page](#) to learn about our upcoming speaker Nick Lavery, Chief Warrant Officer, who is actively serving in the Army Special Forces. This event will be co-hosted with Valor, the Loomis Sayles veterans’ group.

I enjoy hearing from current students, alums and mentors throughout the year. In the spirit of “meliora,” we gather feedback and reflections from our participants throughout each program. You can see the tangible impact UWIN is having on three women in our most recently completed program who provided the following reflections:

Participant Feedback

"I think that this program has fantastic workshops and a great curriculum to offer. The people that were brought in were incredible, and the information they offered would have been offered to us nowhere else. I have been involved with a number of diversity programs, but this is by far the most structured and comprehensive. I feel that everything I learned will really tangibly help my career and life going forward. From the top down, it is evident that UWIN is really invested in our success and well-being. The program is centered around our development and growth, and you can feel that intention behind everything, beyond simply having a program for the sake of recruiting. My mentor was also amazing, and if other mentees have a mentor like her, the program is well worth it. I would describe UWIN in three words: supportive, genuine, and exceptional."

"My participation in the UWIN program has impacted my career aspirations by shining the investment management industry in a new light. A year ago, I found the economics courses I was taking interesting, but I was not sure if I wanted to go into the financial industry. Through the UWIN program I've learned that there is far more to the industry than just studying the stock market. I really appreciate everything that was done to make this program possible. I think it is inspiring to hear from so many successful and smart women in the industry and to now have them as connections and people to look up to. I also appreciated the diversity of the workshop sessions, this kept it very interesting and relevant to our lives and studies."

"I cannot stress enough how wonderful this opportunity truly is and can be to so many others. It is not only helpful to those trying to understand where their interests lie, but specifically to young women who may not have enough voice or confidence to communicate their questions and desires. It is truly such a positive, uplifting, rewarding community of people working together to strengthen one another. This program allowed me to gain knowledge and experience in the industry. I have a bigger and stronger network and so many great connections. I cannot thank everyone enough!"



These reflections speak to the value and power of UWIN.

Even though we are now in our 8th year, we are just getting started seeding 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 program's mission to inspire, develop, and recruit. If you'd like to learn more, get connected, or volunteer, please reach out to me. We need your help to change the face of the industry. We (still) need more women.



Wishing you an inspired 2023,
Shannon

Meet the Class of 2022-2023

UNDERGRADUATE WOMEN'S INVESTMENT NETWORK



Student Spotlight

EMILY ZHU

UWIN PROGRAM: 2022-2023

SCHOOL: WELLESLEY COLLEGE, CLASS OF 2025

MAJORS: ECONOMICS AND COMPUTER SCIENCE

MENTOR: JOHNNY SZE, VP, CREDIT RESEARCH SENIOR ANALYST

Emily spent her fall semester of 2022 with the Custom Income Strategies (CIS) Team where she worked with Michael Frederikse, Zhen Ming and Pramila Agrawal. Under the guidance of Michael, Emily built a ratings migration probability model where she learned to use Python and developed deeper understanding within fixed income. Shadowing her intern manager, Emily honed in analytical skills for determining an investment. Her goal for the internship was to explore the different roles in asset management to help her determine a career in finance. Emily was able to connect with various teams from traders to investment directors, as well as participating in CIS project meetings. Emily's favorite parts of the internship were forming deeper connections with investment professionals and the opportunity to realize her classroom knowledge.

Emily would encourage anyone in her position to learn about the different roles in finance as much as possible: "It is crucial to ask if you see yourself doing that role happily. There are so many positions within finance; Investment Banking is not the only option."

Emily grew up in Shanghai, China and went to high school in Maryland. She loves sports, in particular lacrosse and cross country. She also has a small business called Gejia People where she advocates for the Gejia People ethnic minority group in China.



A REFLECTION FROM EMILY ZHU'S INTERN SUPERVISOR

As a first-time mentor in the UWIN program, I could not have been more impressed with the UWIN structure as well as with our intern, Emily. I was particularly impressed with how quickly Emily picked up new skills, and made a consistent effort to meet with other Loomis employees. I hope that she and other UWIN mentees find the program as rewarding as I have.

Mike Frederikse,
VP, Investment Analyst

Alumna Spotlight

MAMBO STEPHANIE

UWIN PROGRAM: MENTORSHIP 2017-2018
SCHOOL: UNIVERSITY OF MASSACHUSETTS,
BOSTON, CLASS OF 2019
MAJOR: FINANCE
MENTOR: ELIZABETH NAUGHTON, VP,
ASSOCIATE DIRECTOR OF CORPORATE
COMMUNICATIONS

Mambo was a mentee in the UWIN program during her junior year, an intern in the USID program as a rising senior, and a UMASS Boston Student Ambassador for the UWIN program during her senior year. During her UWIN mentorship she worked closely with Elizabeth to build foundational knowledge of the investment industry through regular access to investment professionals at Loomis Sayles. Through these professional relationships, she gained advantage in polishing her interview skills, which propelled her to landing a full-time job offer with her current employer Liberty Mutual Insurance.

Mambo credits the program for being a pivotal foundation in her gaining accessibility to collaborative network of successful women who shared their best practices in the investment industry. Mambo is currently a Portfolio Analyst, after completing the two-year Investment Development Program at Liberty Mutual Insurance.



A REFLECTION FROM MAMBO ON HER EXPERIENCE

The UWIN mentorship gave me the opportunity to access the feedback I needed to develop my career aspirations. Through the program, I was able to witness what happens when women internalize success which gave me the confidence and guidance to be conscious and intentional about my career.

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Mentor Spotlight

The UWIN program is doing a great job of building a pipeline of talented young women to enter the investment management business. As a hiring manager, advisor to W@W, and mentor I have had the pleasure of engaging with many of the women who are either in or have participated in the program. **I am impressed by the caliber of talent, the positive attitude and the resourcefulness every time. When hiring, knowing a candidate is a UWIN alum definitely gives them a leg up in the interview process.**

Elaine Stokes, Executive Vice President, Portfolio Manager



I feel so fortunate to have the opportunity to mentor in the UWIN program. As the father of two young daughters, I am very passionate about them and all young women having the same opportunities as my sons. **Women have been underrepresented in the investment management industry for too long and I want to help change that.**

I am a strong supporter of UWIN's mission, and my mentorship experience has been very rewarding and mutually beneficial. I have learned as much from my mentee as she has from me. I really enjoy our conversations. She is enthusiastic, eager to learn and asks great questions. I am looking forward to continuing to build our relationship and connecting her with others at Loomis Sayles.

Greg Woodgate, VP, Director, Finance and Treasurer



My experience as a mentor in the UWIN program has been truly rewarding. It has been inspirational for me to be able to share my journey as a woman in finance. Prior to becoming a mentor, I had never fully appreciated the impact my experiences and insights might have on someone just starting their career. **My partnership with my mentee has given me the opportunity to appreciate the benefits we are both gaining from the program.** I hope that my experiences and advice will help prepare and guide my mentee for a successful career in finance. I look forward to encouraging more woman to share their unique experiences.

Teresa Woo, CFA, VP, Relationship Manager



Inside a Mentorship

How often and where do you typically meet?

Caroline: Preston and I meet for a half hour either 1 to 2 times a month. Our meeting is usually done over a phone call or facetime. Although, we are hoping to be able to schedule an in person meeting during a workshop day when I come to visit the office in the following months of the mentorship program! Preston and I communicate often what date/time works best for our schedules in order for us to be most productive with our time connecting. Preston has been very flexible with my changing schedule. For instance, I was able to reach out to him whenever I needed any advice whether it was for a specific interview or for help with revising my resume.

What is your biggest takeaway from this experience?

Caroline: **My biggest takeaway from this experience is that you get out what you put in.** It is inevitable that some setbacks will come your way as you are trying to accomplish the goals you set out for. Although, you can't let those setbacks stop you from putting in the work and striving for success.

Preston: **Communication is vital for getting the most out of the mentor/mentee relationship.** Working with Caroline has been easy because she communicates her needs and goals, and asks questions.

What is the best advice your mentor has given you?

Caroline: The best advice Preston has given me over the course of this experience was to always be genuine whether I was preparing for an interview or seeking networking opportunities. Preston taught me that if you are prepared there is no reason to try to oversell. I have learned that interviews should not feel robotic and should instead carry on as a genuine conversation. In addition, another tip I learned was to bring something to the table that will make you stand out when speaking with new people in the industry. This can be a project or writing piece you are most proud of that exhibits the relevant skills you possess that qualify you for a position.

As a mentor, what skills did you feel were most important to share with your mentee?

Preston: Be yourself! Interviewers want someone who is competent but they also want someone who will fit with coworkers from a personality and culture standpoint. Do your homework first but then try to let your interpersonal attributes shine during the interview process.

What was your favorite workshop to attend thus far?

Caroline: My favorite workshop so far would be the November workshop that focused on how to make your resume and cover letter stand out and a session on communication. During the resume and cover letter portion we were able to ask critical questions about the rights and wrongs of the job application and interview process. This was very helpful to hear feedback from professionals in the industry who have been on the other end of the process. I really enjoyed working with the communications consultants because this session was very interactive and allowed me to self-reflect on my own communication skills. We did exercises that made everyone step out of their comfort zone a little bit and gain feedback and tips on how to improve for the next time we will have to speak in a professional environment.



CAROLINE BARBIERI
CONNECTICUT COLLEGE, CLASS OF 2024
UWIN PROGRAM: MENTORSHIP 2022-23



PRESTON RAYMOND, CFA
UWIN MENTOR
VP, SENIOR FIXED INCOME TRADER

What is the most important characteristic a mentee/mentor could portray prior to entering this program?

Caroline: As a mentee, **I believe the most important characteristic to have before joining the mentorship program would be to always be curious.** I feel I have learned so much from this experience by simply asking questions and inquiring about different career paths that may interest me. I shared with Preston that I am not quite set on a certain career path just yet, so when talking about different opportunities we were able to keep my options open. This sparked many unforeseen conversations and experiences.

Preston: Take initiative, especially in subjects you are interested in. Simply applying for the mentorship shows initiative in that Caroline was willing to participate in a program on top of her studies and athletic obligations. From there, take advantage of the resources of UWIN. Caroline has access to professionals with decades of experience in the capital markets. Ask questions, ask for introductions, squeeze everything you can out of Loomis. It will pay off down the road. Networking is an important skill and this program is a great start.

What's New at Loomis Sayles?

Loomis Sayles continues to expand its employee resource groups (ERGs)!

The Early Career Professionals (ECP) was created in 2022 as a group within Loomis Sayles' Women@Work ERG. ECP's mission is to collaborate, foster and retain a diverse community of talent through networking, career development, and engagement opportunities.

In addition to hosting several lunch and learns with senior leaders, a social pickle ball event, and a golf lesson, ECP co-hosted two fireside chats with other ERGs at Loomis Sayles. Collaborating with the Allies ERG, ECP co-hosted the authors of *"Undiversified: The Big Gender Short in Investment Management,"* a book we highly recommend! This was followed by a partnership with the UWIN program to host the inaugural UWIN Inspiring Speaker Series webinar event with leadership expert Susan Brady. Susan is the CEO of Simmons University Institute for Inclusive Leadership and the Deloitte Ellen Gabriel Chair for Women and Leadership. Susan shared her perspective on purposefully navigating your career, conquering common hurdles for young women, and embracing successful leadership practices. For more detail, we recommend Susan's recently published best-selling book *"Arrive and Thrive: 7 Impactful Practices for Women Navigating Leadership."*

We thank the leadership committee of ECP including Zoe Calianos, Credit Research Senior Associate, Colleen Collins, Credit Research Associate, Claudine Daneri, Equity Research Associate, Elizabeth DiTomaso, Investment Associate for Full Discretion and Linda Shin, Insurance Solutions Associate.

The UWIN program hosted Stonehill College's Women in Finance club in December 2022 for a tour and engaging discussion with a panel of women in research, trading and portfolio management functions.

Upon arrival, the group met with Megan Giambanco (Stonehill College 2022) and Tricia Keefe who led a tour of the office, accompanied by a brief history of the firm. The group then participated in a panel discussion with Kathryn Coburn, Jackie Diloyan, Shannon O'Mara and Heather Young.

Stonehill College Women in Finance Club Visits Loomis Sayles



The visit gave the group the opportunity to learn about the fixed income industry and different career paths within Loomis Sayles. The Stonehill College students shared, "the visit was beneficial and enjoyed by all who attended, leaving us inspired in our career journeys."

NEW



UWIN is on Instagram!

THE PROGRAM CONTINUES TO GROW ON ITS SOCIAL NETWORK

We are excited to introduce UWIN's official Instagram page! We launched this new channel in September 2022 to share highlights of the program, spotlights on UWIN participants and advice for young women interested in career in investing. Follow us @UWIN_LoomisSayles!



FOLLOW US
@UWIN_LoomisSayles



We Are Hiring!

Investment Associate 

Visit the Link in Our Bio to Learn More & Apply

Disciplined Alpha Team in Orinda, CA

Learn about fixed income products and markets and join a growing collaborative team.



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The Undergraduate Women's Investment Network at Loomis Sayles 

Looking for a Summer Internship?



Women in Investment Management Internship Program
The CFA Society Boston facilitates summer internship opportunities for women undergraduates at six Boston area firms, including Loomis Sayles.

Applications are due October 31.
Visit the link in our bio to learn more and apply!



UWIN Inspiring Speaker Series



featuring...
Susan Brady
CEO, Simmons University Institute for Inclusive Leadership

Date: November 14 **Location:** Webinar details will be emailed to the UWIN and ECP networks.
Time: 5pm-6pm EST

Join us and hear from Susan Brady as she shares her perspective on purposefully navigating your career, conquering common hurdles for young women, and embracing successful leadership practices.



Good News

JOBS, INTERNSHIPS, CHANGES & LIFE EVENTS!

Graduates Launching Careers in 2023

- Victoria Chan – Barclays
- Martina Chin – Goldman Sachs
- Alana Chernyak – Fidelity
- Stephanie Chiasson – Scotiabank
- Emma Diianni – MUFG
- Shaelyn Fitzgerald – Loomis Sayles
- Kaitlynn Giombetti – Deloitte
- Victoria Hodgkinson – Bank of America
- Leilah Johnson – Dell Technologies
- Sahithi Macharla – Brandeis Office of Investment Management
- Stephanie Mittaz – Loomis Sayles
- Lauren Murray – Loomis Sayles
- Emily Shal – Citi
- Talia Vincente – William Joseph Capital Management
- Isabella Wu – Bank of America
- Tianyi Zhou – Citi

Incoming Summer 2023 Internships

- Jenny Baron – Sensata Technologies
- Carolina De Leon – Loomis Sayles
- Mackenzie Gorman – Goldman Sachs
- Ai Quyen Le – John Hancock
- Marie Maher – Fidelity Investments
- Shannon Oar – Fidelity Investments
- Vandana Patel – Loomis Sayles
- Nina Radman – Goldman Sachs
- Elizabeth Spalla – Goldman Sachs
- Emily Zhu – Oaktree Capital

If you have good news to share, we'd love to hear it!
Email us at UWINinfo@loomissayles.com



UWIN 2021-22

I am very proud to be a part of such an inspiring program that has impacted my life for the better. This has been such an influential program that has really helped me get where I am today.



UWIN 2022-23

I left the workshop feeling so empowered, confident and excited in knowing that it is not (and never was) out of the realm of possibility for me to become a strong, driven leader in finance.

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Good News

JOBS, INTERNSHIPS, CHANGES & LIFE EVENTS!

Alumni Updates

- Sybill Emmanuel – I pivoted to filmmaking and recently wrapped up the screenplay of my first feature, Fundraise. I am working on producing and directing the pilot for upcoming film festivals and investment pitches. The story is centered on a local tech entrepreneur leading a Series B fundraising round for her company who must also fend off a hostile takeover while simultaneously defining her own happiness. We are in the pre-production phase for the pilot, and I am working with a cinematographer, scouting shooting locations and recruiting actors. Wearing the Screenwriter, Director, and Producer hats are as challenging as it sounds but nevertheless very exciting. We plan on starting filming in mid-January with the hope of having the completed pilot in February.
- Bernice Galebach – During the pandemic I went back to school for nutrition and hypnotherapy, and I am currently in a clinical residency program. I am specializing in working with weight loss, body image, confidence, and immune disorders.
- Shiva Haghighi – Gave birth to a beautiful little girl in 2022!
- Karoline Ioukhnikov – I started my new role at Criteo in January 2022 as an account strategist, and I got married in October 2022!
- Deanna Leung – Last year I was teaching English in Korea with the Fulbright program, and now I've become a Program Coordinator at the Korean-American Educational Commission.
- Bella Luciano – I passed the SIE and Series 7 exams this summer! I'm now studying for the Series 63 exam and looking forward to being fully licensed.
- Tymber Long – I'm still working in Wichita, KS as an attorney. I recently obtained my Missouri license and am working on my Nebraska license as well. Other than that, I'm keeping busy with work and trying to travel as much as I can!

Awards, Accolades and Other News to Celebrate

- Makenzie Gorman – I am excited to leave for Sevilla, Spain to spend a semester studying abroad at Universidad Pablo de Olavide. In the meantime, I will be continuing my UWIN mentorship remotely and preparing to transition to New York for my role as a summer analyst at Goldman Sachs. A lot of change is on the horizon in 2023, and I am excited for a year of new places, delicious food, and personal growth.

If you have good news to share, we'd love to hear it!
Email us at UWINinfo@loomissayles.com.

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Good News

JOBS, INTERNSHIPS, CHANGES & LIFE EVENTS!

Awards, Accolades and Other News to Celebrate (CONT.)

- Victoria Hodgkinson - I was elected to the Connecticut College Peggotty Investment Club Executive Board as Vice President of Education. I have also helped restart the Connecticut College Women in Finance Club and currently sit on the Board. I am looking forward to my graduation from Connecticut College this Spring with a Bachelor of Arts, double majoring in Economics and International Relations and minoring in Hispanic Studies.
- Leilah Johnson - I lead the Women in Finance (WIF) club, which co-sponsored a networking dinner at Stonehill College during the fall 2022 semester where students networked with professionals from various companies, including three professionals from Loomis Sayles. Another successful event for the club was our visit to Loomis Sayles in December 2022, which was a great opportunity for young women to learn about and speak to women at the firm.
- Shannon Oar - I have been chosen as 1 of 25 juniors at Bryant University to be inducted into Omicron Delta Kappa (ODK). ODK is a National Leadership Honors Society that recognizes students based on scholastic achievement and accomplishments in leadership. Students must be in the top 30% of the class and have been nominated by current ODK members. I was elected as President of Bryant Best Buddies this semester after being the Treasurer for 2 years! Bryant Best Buddies is a club that hosts events for the Bryant community that foster inclusion and friendship with people diagnosed with various intellectual and developmental disabilities.
- Talia Vincente - I am working on finishing up both my honors thesis and Economics capstone. My thesis is "The Environmental Effects of Consumer's Purchasing Behavior on Fast Fashion" and my capstone is "How the Misery Index should include a 5x Unemployment Weight to Compare it to Election Results." I was nominated for the Omicron Delta Kappa honors society at Bryant, as well as the Omicron Delta Epsilon Economics Honors Society. I was also given the Dr. William B. Sweeney Memorial Scholarship, which was given to an Economics Major from RI.



UWIN 2019-20

The UWIN program has motivated me to not limit the possibilities ahead for myself. It has helped me gain the confidence necessary to succeed in any career path. More so, the program has inspired me to continue to advance the position of women in the finance industry. It has also given me the knowledge to navigate and dream big about a career in finance.

If you have good news to share, we'd love to hear it!
Email us at UWINinfo@loomissayles.com.

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UWIN 2023 – 2024

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, 2023.

RECRUITING DATES

February 1, 2023: Application opens on the Loomis Sayles careers website

February 21, 2023: UWIN Information Session
([Click here to register](#))

March 10, 2023: Applications due

March 20-30, 2023: Candidate interviews conducted

April 15, 2023: Decisions communicated

CONTACT US

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UWIN LEADERSHIP

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

Zoe Calianos, Senior Credit Research Associate – UWIN Internship Program Coordinator

Andrea DiCenso, VP, Portfolio Manager & Strategist – UWIN Advisor

Erika Fallon, Administrative Supervisor & Senior Administrative Assistant – UWIN Events Coordinator

Steve Hoppe, VP, Senior Fixed Income Trader – UWIN Mentorship Advisor

Tricia Keefe, VP, HR Business Partner – UWIN Mentorship Program Coordinator

Kristy Keenan, VP, Associate Investment Director – UWIN Internship Program Coordinator

Kristen Moldovan, Senior Credit Research Associate – UWIN Intern Advisor

Marissa Neill, VP, Administrative Manager – UWIN Marketing & Recruiting

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



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