BMO Equity Through Education Program with the FWA

2020 Baruch College Corporate Valuation Training and Stipend Recipients
This fall, BMO and the FWA provided a stipend to 17 Masters-level students from underprivileged and underrepresented backgrounds at Baruch College's Zicklin School of Business.

In addition, BMO and the FWA provided *Training The Street*s intensive one-day, virtual Corporate Valuation course, which explores the fundamentals of valuation techniques used by finance practitioners, to almost 200 Baruch College students.

In the next pages, the 17 stipend recipients shared how *Training The Street*s course helped their knowledge of finance, while expressing their gratitude to BMO and the FWA for the generous support on behalf of all Students from Baruch College.

*Baruch College students logged into Training The Street's intensive one-day, virtual Corporate Valuation course on November 20, 2020, sponsored by BMO and the FWA.*
Rosario Campoverde (MBA '20)

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The Corporate Valuation Training has provided me with insightful tools for understanding what a business is worth today, what drives value and how to tackle the challenges associated with a post-pandemic scenario. For example, using real-life cases and valuation methodologies such as Discounted Cash Flows, Public Comparables and M&A Analysis through will help advance my career in Finance. Currently studying an MBA focused in Finance and being involved in educational initiatives inside and outside of Baruch College has helped me understand the importance of financial education not only for professionals and entrepreneurs, but also for underserved communities and the role that we all play in applying and sharing these teachings to ultimately benefit the society as a whole.

Unnati Dachepalli (MS Finance '20)

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I really benefitted from the Corporate Valuation Workshop, since it will help me prepare for interviews within finance. Moreover, the access to offline course documents and the option of asynchronous practice are terrific. As a woman who is looking to move from accounting to a finance-focused career, this course and training has already helped me develop sharper valuation skills. I want to thank BMO and FWA for giving me this opportunity to learn and enhance my skills.
Gereltod Erdenesaikhan (MS Finance ‘21)

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I would like to thank the BMO Equity Through Education Program and the FWA for providing me with such an excellent opportunity to get one step closer to my professional goal. The Training the Street course helped me grasp a bigger picture of corporate valuation. The workshop taught practical applications of financial concepts in a way that brings corporate valuation and financial modeling skills to the real-world, filling the gaps uncovered in academic theories. It left me eager to pursue a more in-depth understanding of corporate valuation overall. I also appreciate how the study materials were designed to prepare students for potential interview questions by having two or three interview questions on each slide. Now, I feel more confident in my pursuit of roles and interviews in finance.

Shelly Ann Ivey (MS Taxation ’22)

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Minority women are the most underrepresented group as it pertains to the financial-services industry, and it is an issue about which I am deeply passionate. As a female student of color, it was my desire to use the Training the Street course to increase my career potential. It was not only wonderful to have been able to participate in the workshop, but having access to the portal’s self-guided tutorial is something I’ll continue to access. Prior to participating in the training, my knowledge of concepts such as transfer pricing and valuation was primarily theoretical. Having been exposed to more practical knowledge of such concepts will make me a more viable candidate to employers, enhancing my career progression. Thank you BMO and FWA for sponsoring this workshop and for making this a possibility for me!
Hardi Kaneria (MS Finance '21)

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Sheryl Sandberg once said, “We’ve got to get women to sit at the table.” I come from an ordinary middle-class Indian family, and I am fortunate enough to have the opportunity to work towards my ambitious dreams. With my passion for finance and quantitative aptitude, I am eagerly pursuing a career in finance. The Training the Street valuation course gave me a hands-on opportunity to learn core concepts of finance, which are so important for my career goals. Ultimately, it helped me polish and broaden my knowledge of various valuation techniques. I would like to extend my sincere gratitude to BMO and the FWA for providing the training to students, as well as the generous stipend to me for my future.

Kira Narine (MBA ‘22)

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BMO’s Corporate Valuation Training Program was an incredible experience for which I am extremely grateful. I decided to pursue my MBA at Baruch’s Zicklin School of Business in order to transition into a career in finance. The four-hour training course helped me develop a fundamental understanding of valuing a company, as well as the additional online resources the training course included. The training offered me a place where I felt comfortable learning, asking questions, and participating. Even as a minority immigrant woman, I know I have the ability to succeed in a financial career. I am very grateful for the generosity of BMO and the FWA, as well as their commitment to empowering students from underrepresented backgrounds to pursue and succeed in a career in finance. The support of the BMO Through Education Program and FWA showed women and minorities that there is indeed a place for us in corporate finance. Thank you so much!
Julissa Ovalles (MBA '22)
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As a Latina attending an MBA program and considering a switch into corporate finance, I would like to thank BMO and FWA for giving me the opportunity to participate in the Training the Street Corporate Valuation course as well as the generous stipend. The training reinforced my understanding of finance. I believe financial metrics not only help students pursuing careers in Finance, but also those pursuing other areas as well, such as Operations and Management. Understanding the financial foundation of a business is essential for every business graduate. Thank you!

Crismely Pena (MBA '23)
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I am a first-year MBA in Accountancy student working towards my CPA, currently working as a Finance Associate in a nonprofit. The Corporate Valuation course was my first exposure to corporate finance. The training material covered was new to me, and I learned so much as the training progressed. The course completely opened my eyes to corporate finance, and I am excited to take more corporate finance courses and do more research on finance as a profession. Many thanks to BMO and FWA for the opportunity and very generous support!
Fabianna Rodríguez-Mercado (MBA '22)
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As a first-generation Latina MBA student, I am looking forward to exploring the modeling and valuation techniques from the Training the Street course that are commonly used by Wall Street firms. In my first semester as an MBA student, I have already learned how critical Mergers and Acquisitions (M&A) is for companies and industry growth. This training will positively impact my career progression as I continue exploring the fundamentals of finance valuation techniques. Thank you to BMO and FWA for the opportunity!

Victoria Tambaeva (MBA '22)
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Before immigrating to the US, I worked for an investment bank where I actively participated in investment projects that helped women grow their businesses. I witnessed how my clients, who included small-business owners, farmers, and artisans, prospered and contributed to their communities. In the US, I have not had experience in financial services. The Corporate Valuation course gave me a broader understanding of valuation methodologies and analysis, and helped me determine what steps I need to take next to succeed with my goals of working in companies that do impact investing in sustainable businesses.
JingJing Xu (MS Real Estate '21)

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I have been focusing on building my analytical skills since day one at Zicklin School of Business. As a business school graduate student, I always wanted to know the valuation techniques used by finance professionals on the practical side, especially the knowledge of Acquisition Comparables Analysis. An accurate valuation can provide a clear growth trajectory of a business as well as give business owners more leverage in a resale scenario. Ultimately, it is an essential tool for me to begin my career in finance. Thank you to BMO and FWA for providing this great opportunity!

Miguel Barbosa (MBA '21)

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After several years in the financial industry, I found that in order to stay competitive, learning new skills was essential. For this reason, I decided to pursue an MBA. In addition to the excellent curriculum from Baruch College, additional training is very valuable to me. Taking the corporate valuation course gave me additional resources to better understand the techniques of the valuation process and its relevance in the business world. As an MBA student, I picture myself working on a finance team in a big corporation, and so I have to be prepared for very technical interviews. For this reason, the corporate valuation training will give me more confidence when going on interviews. It will put me in a more advantageous position among other candidates and will pave the road for advanced studies in corporate valuation. Thank you, BMO and the FWA, for sponsoring this and for supporting Baruch students!
Nate Chee (MBA '22)

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The corporate valuation training provided by Training the Street, through BMO and FWA, equipped me with the knowledge and confidence I needed to apply for the investment banking summer associate program with Rothschild. The training consolidated all the materials I learned in my accounting and finance classes. This will bolster my credentials in my application and allow me to better articulate my qualifications during the interview. Thank you so much for your support, BMO and FWA!

Fei Li (MS Accountancy '21)

I am a US Army veteran, having worked in the logistics field when I was in service. I am very interested in finance, and the Training the Street course helped me enrich my knowledge in the area. In addition to corporate valuation, I learned how to calculate Enterprise Value and Equity Value. As a student focusing on Accounting, it is fascinating to understand how investors value companies through ratios and equations including equity value per share, EBITDA and more. Tremendous thanks goes to BMO and FWA for providing this wonderful opportunity!
Stephan Steiner (MBA '22)

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I am a first-generation, black college student pursuing an MBA with a concentration on Data Analytics. My undergraduate degree was in Business Management and Finance, and I am currently working as a part-time Finance Fellow at a non-profit called (RED). My long-term aspiration is to join an investment firm. I believe that through the Training the Street program and generous stipend provided by BMO and FWA, I have taken another significant step to building a career as a Financial Analyst. In particular, knowledge of the valuation of firms is of ongoing importance when dealing with VC, Private Equity and banking. I hope to take advantage of future programs as I complete my Masters Degree and look forward to where I will be in the next few years. As such, I want to thank BMO and FWA for this opportunity and generous support.

Akobana Herve Tcha (MAB '22)

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My interests in pursuing my MBA are in financial services and data analytics, and a significant part of my core curriculum at the Zicklin School of Business is on corporate valuation and strategy. I have already incorporated part of Training the Street techniques in my Comparative Strategy course, which consists of finding value in a company simulation. The goal is to use valuation techniques and drive value for this company to entice a buyout from a private equity firm. Doing the course with Training the Street is a tremendous asset and will help me achieve my dreams of entering the financial world. Thank you BMO and FWA!
Alexander Wood (MBA '22)

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I am an MBA student targeting a post-grad school career in Asset Management. Thank you so much to BMO and the FWA for sponsoring my participation in the Training the Street Corporate Valuation workshop, as well as the generous stipend towards my education. The valuation methods I learned will serve me well in my Investment Analyst internship that I have coming up in January, and I expect they will be something I draw on frequently as I work towards completing my MBA and in my career going forward.

The resumes of these terrific stipend recipients can be found on the next pages.

Thank you to BMO Equity Through Education Program with the FWA for making such an impact on Baruch College students!