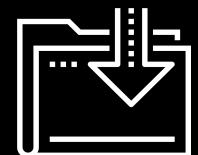


FinTech Boot Camp Orientation

FinTech
Online—Welcome Session



WELCOME!



Virtual Class Best Practices

Best Practice 1: Always Mute

Please keep your microphone muted, unless you are called on or your host asks for feedback/communication.



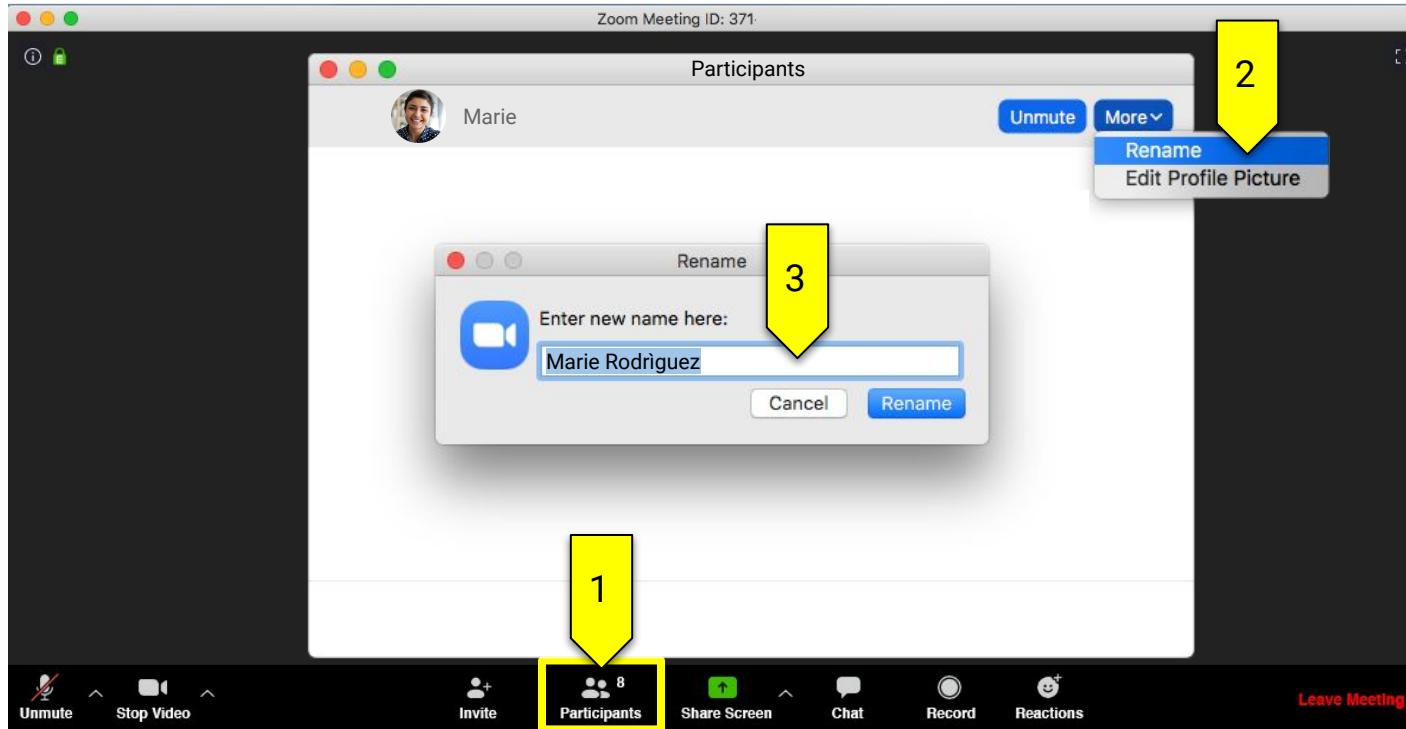
Best Practice 2: Turn Your Video On

Kindly turn your video on so we can see you.



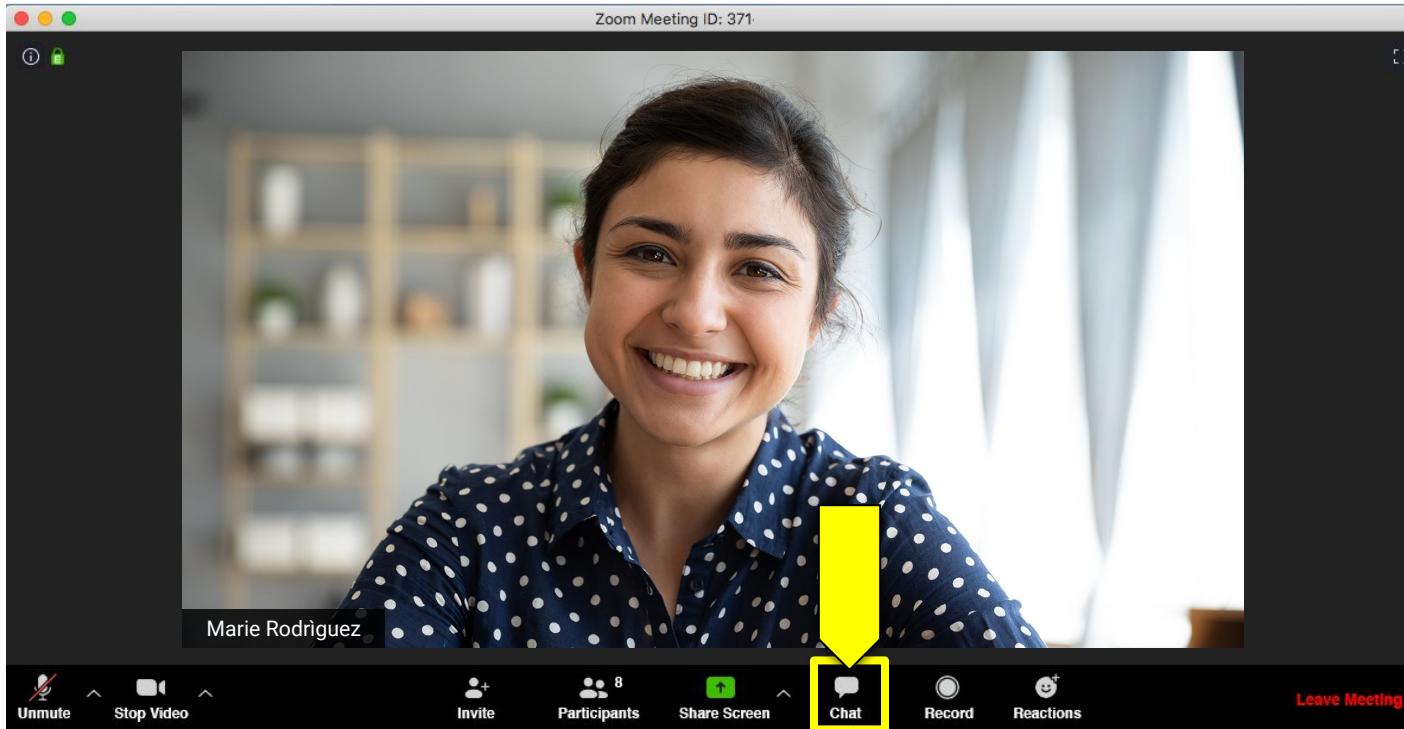
Best Practice 3: Update Your Name

Please update your name under the Zoom *Participants* tab to your full name.



Best Practice 3: Actively participate

We ask that you actively participate in the session by answering questions and being a part of the conversation in your class's Slack Workspace or Zoom chat.



Orientation Overview

What Will I learn?

By the end of this session, you will:



Get to know your instructional and support staff members



See how to successfully navigate your boot camp portal



See how virtual classes work and successfully complete this first session



Configure multiple technologies that will play a vital role in your toolkit of success



Be aware of the career services available to you and how to access them



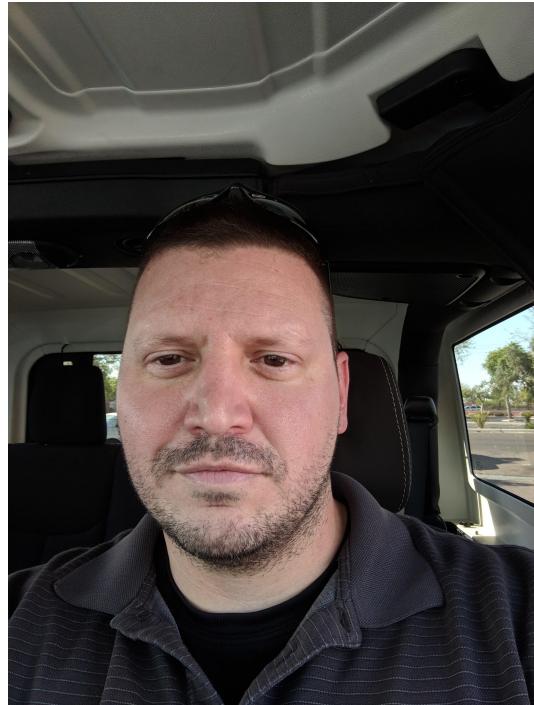
Understand the minimum requirements in order to successfully graduate from this boot camp

Jeff Susmarski

Student Success Manager

Professional and educational background
I have been in education for 11 years
MBA degree

Hobbies and interests
Motorsports, Traveling, Video Games
Husky and Malamute - Kona and Bjorn



Kevin Lee

Instructor

- Instructor at U.C. Berkeley for the FinTech and Data Analytics Programs
- Senior Developer - Deep Learning at Nvidia
- Former Risk Analytics Officer at Morgan Stanley
- 10+ years in Finance and Technology sectors
- I'm excited to show you guys the exciting new ways the Finance Industry is using technology to solve problems



Lawrence Zhang

Teaching Assistant

Senior Data Scientist at Earnin
Masters in Operations Research - UC Berkeley

I love building and using technology that expand financial access, and I'm looking forward to sharing that with you!



Jimmy Tran

Teaching Assistant

- Quantitative Analyst at First Republic Bank
- Data Fellow at Delta Analytics and
- Former Data Consultant for CareerVillage.org
- B.A. Statistics - UC Berkeley
- A.A. Philosophy - Foothill College
- Absolutely thrilled to be part of this community of future FinTech movers and shakers!

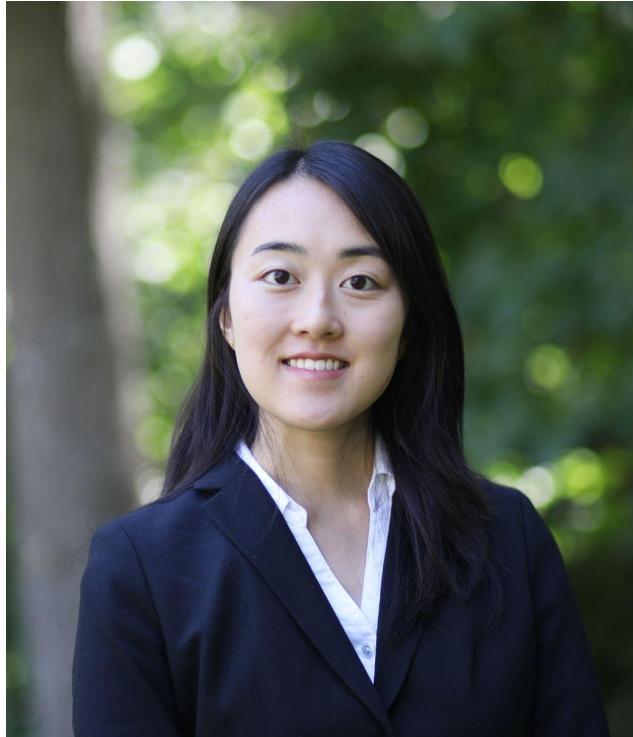


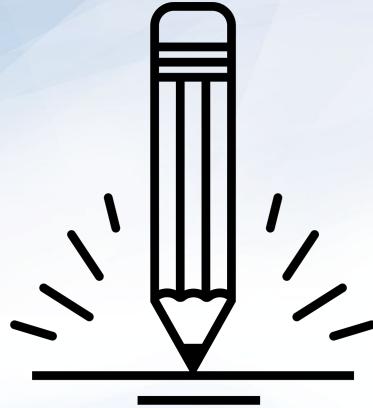
Jennifer Zhang

Teaching Assistant

Quantitative Consultant at EY
Master's in Applied Economics - UCLA

Looking forward to learning together!





Group Activity:

Getting to Know Your Cohort

Suggested Time:
10 Minutes



Getting to Know Your Cohort

To complete this activity, you need to perform the following steps:

1. Live the golden rule.
2. Turn on your video and unmute your microphone (video is **mandatory**).
3. Break the ice! We're about to embark on a difficult journey together. Ask some questions like:
 - a. "What was a fun thing you did recently?"
 - b. "If you could live anywhere in the world, where would it be?"
 - c. "What kind of music have you been listening to?"

Suggested Time: 10 Minutes



Boot Camp Experience

What does “for working professionals” mean?

What it means:

- Only 2 required classes per week
- Flexible support from instructional staff on weekends and evenings
- Curriculum built around common real-world scenarios



What it DOESN'T mean:

- You can commit less time than our in-person offering
- You'll need less discipline to complete the course
- You can restart the course again at a later date
- You won't be challenged!



Life in the Boot Camp

01

Online Lessons

Every week will present new lessons to install and learn new tools, all **anchored on a real-world project.**

02

Live Support

We'll come together weekly to cement the concepts from your self-paced learning.

Structured classes, office hours, and study halls provide **additional support** throughout the week.

03

Weekly Challenge

Each week, you'll submit a challenge assignment around the module's technologies.

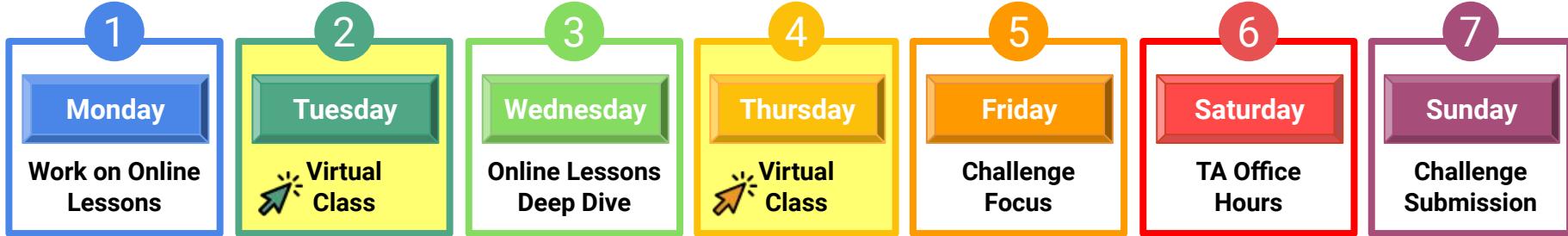
There will be 3 **comprehensive team projects**, spaced throughout the curriculum, that integrate skills from the previous weeks and provide a valuable work product.

Tips for Success

Use a calendar (digital or physical) to plan out your weeks

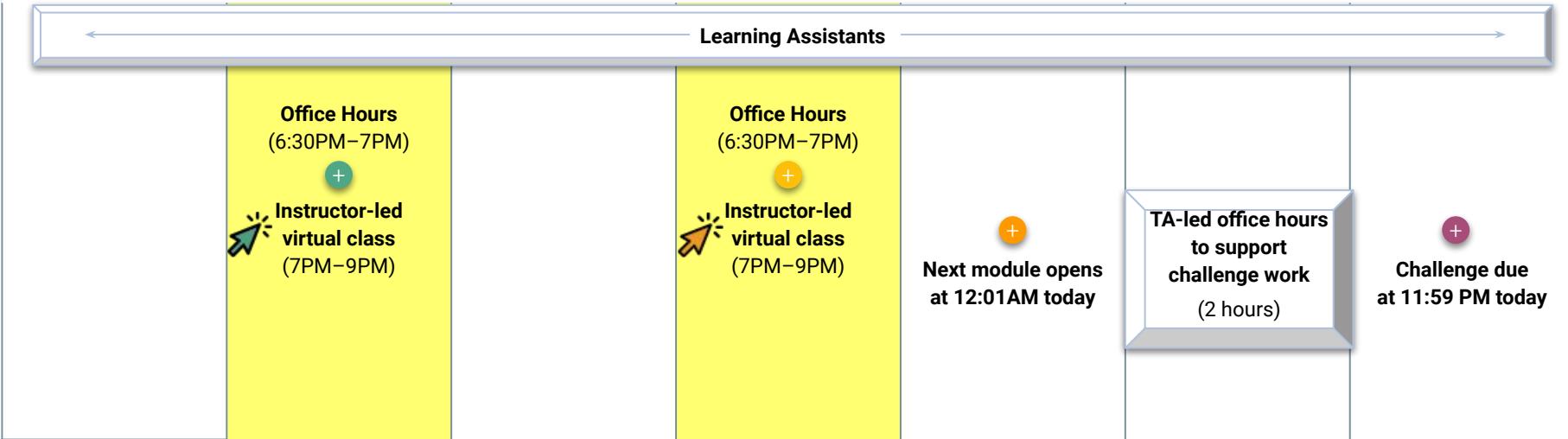
| | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |
|----------|-----------------------|---------------------------------|-----------------------|---------------------------------|-----------------------|-----------------------|--------|
| 7:00 AM | | | | | | | |
| 7:30 AM | | | | | | | |
| 8:00 AM | | | | | | | |
| 8:30 AM | | | | | | | |
| 9:00 AM | | | | | | | |
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| 10:30 AM | | | | | | | |
| 11:00 AM | | | | | | | |
| 11:30 AM | | | | | | | |
| Noon | | | | | | | |
| 12:30 PM | | | | | | | |
| 1:00 PM | | | | | | | |
| 1:30 PM | | | | | | | |
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| 5:00 PM | | | | | | | |
| 5:30 PM | | | | | | | |
| 6:00 PM | | | | | | | |
| 6:30 PM | | Office Hours | Dinner Break | Office Hours | | | |
| 7:00 PM | Homework (2 hours) | Instructor-led virtual class | Homework (3 hours) | Instructor-led virtual class | Homework (2 hours) | Homework (2 hours) | |
| 7:30 PM | | | | | | | |
| 8:00 PM | | | | | | | |
| 8:30 PM | | | | | | | |
| 9:00 PM | | | | | | | |
| 9:30 PM | | | | | | | |

Weekly Calendar

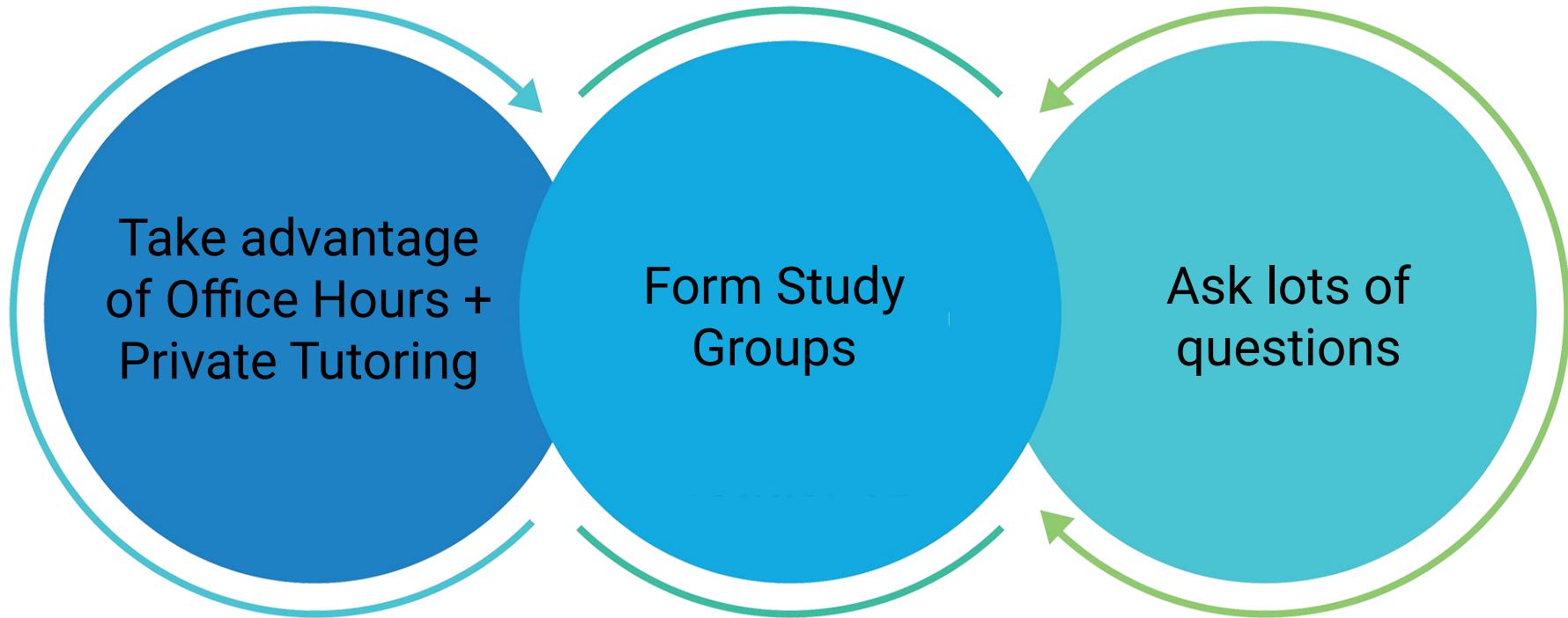


Academic support

Learning Assistants



Tips for Success



Minimum Graduation Requirements

These are the **minimum** graduation requirements.



Miss no more than 8 Virtual Classes



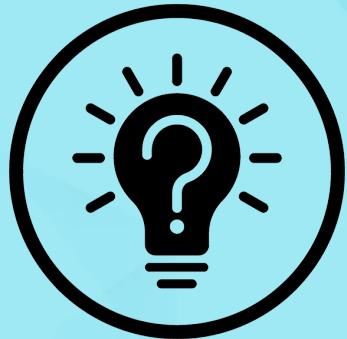
Achieve a grade of at least 72% and have no more than 2 incomplete assignments



Participate in all class projects



Tuition Paid in Full



Policies

Bootcamp Spot

What will I use Bootcamp Spot (Canvas) for?

Here's what you'll do in Bootcamp Spot:



View course content and lecture videos



Submit homework assignments by submitting files, text or links to GitHub



Take quizzes and assessments



Connect and participate in your Virtual Classes with Zoom



View your attendance and grades



Find information on and connect with Career Services

My Course in Bootcamp Spot

Your Bootcamp Spot homepage will look similar to this:



Module 0: Getting Started



Module 1: Financial Programming with Python



Module 2: Financial Applications Python



Module 3: Financial Analysis with Pandas



Module 4: Quantitative Analysis with Pandas



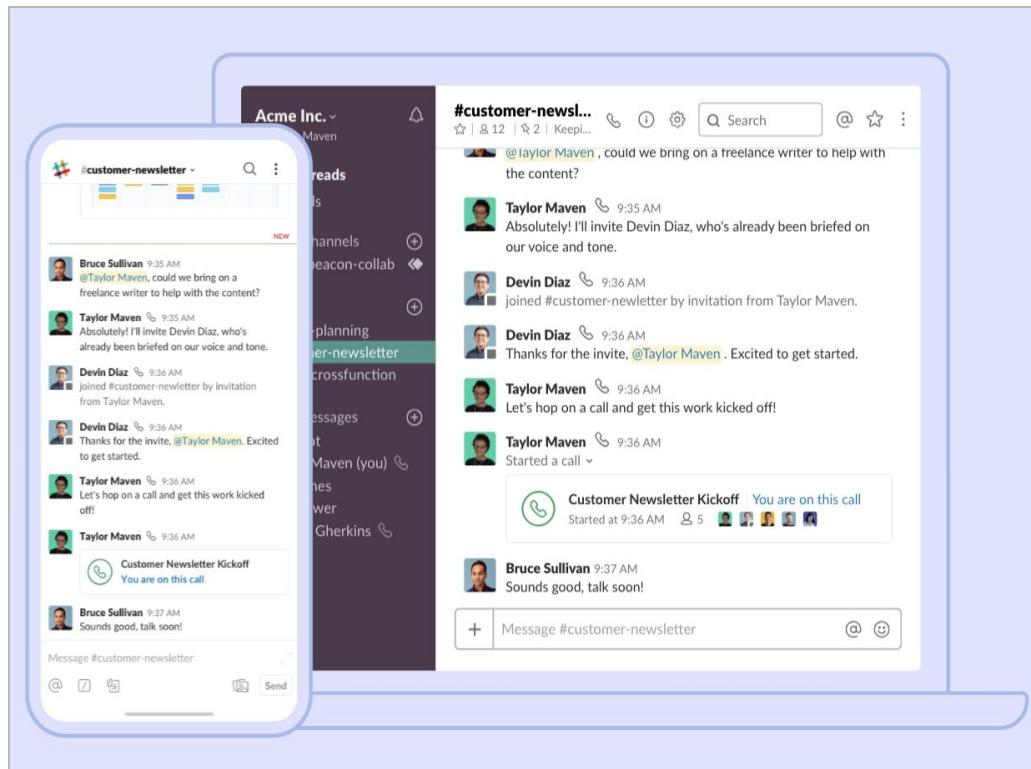
Module 5: Financial Simulations with APIs

Today, we'll show you the layout of your course, and go over the process of navigating through your first module and talk about how to submit your first Challenge assignment.

Collaboration on Slack

Slack is the shared virtual workspace where your class will interact during and outside of class hours:

- This class requires a lot of collaboration, so being able to share messages and files quickly is crucial for our success!
- After creating an account, be sure to bookmark the URL in your browser for easy access or download the Slack desktop app if you have not already.



TA Office Hours

Our TAs will hold Office Hours to provide support outside of class times. This is an unstructured, “drop-in” session where you can bring any question to the table.

For our first set of Office Hours, we will be reviewing the downloads and installs from the prework to make sure you’re ready for class!

Office Hours will take place every **Saturday** from **12pm to 2pm**.

AskBCS Learning Assistant

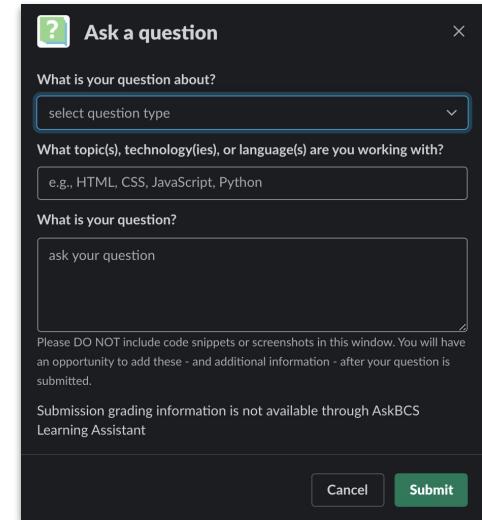
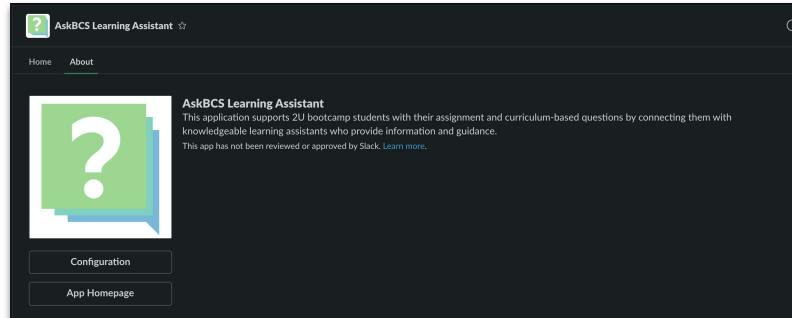
Within the Slack workspace, you should see an App called [AskBCS Learning Assistant](#)

Our team of LAs work
during the daytime to help
you get unstuck with your
self-paced lessons.

They're available:

Monday - Sunday:

24 hours, 7 days a week



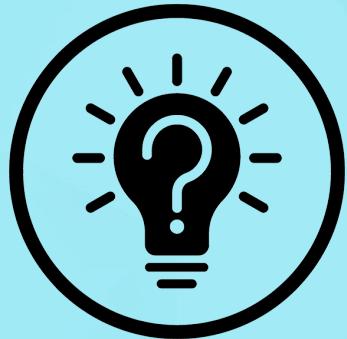
GitHub

Git is software that lets you save a lot of different versions of a file or project.
You'll hear Git as a prefix to a few things in the course.

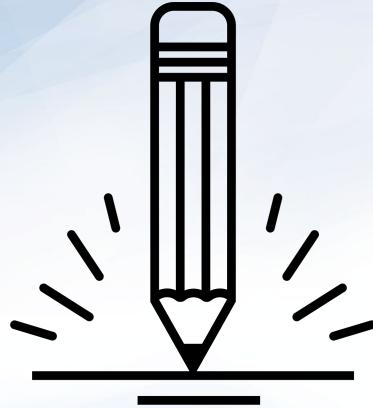


- Your own portfolio
- Store your homework here, and submit a link to Bootcamp Spot
- Use it beyond the boot camp

Note: Git and GitHub are common sticking points for new students.
The first few TA Office Hours sessions will focus on setting these up properly.



Systems



Activity: Systems Check

Suggested Time:
5 Minutes



Activity: Systems Check

You should have access to the following systems. Follow the steps below to check, and type “ready” in the Group Chat if you’re good!

01

Bootcamp Spot

Navigate to
courses.bootcampspot.com/
and you should see the
full course!

02

Slack

React to the post in your
[#01-live class](#) channel



Career Services

Becoming Employer-Competitive

Employer-Ready and Employer-Competitive

What does employer-ready and employer-competitive mean?

Employer-Ready

An employer-ready candidate has created strong professional materials that meet the basic criteria for the typical job application process.

Employer-Competitive

Once created, these materials should be adapted to target specific career goals and opportunities, elevating them to employer-competitive.

Milestones to Career Success



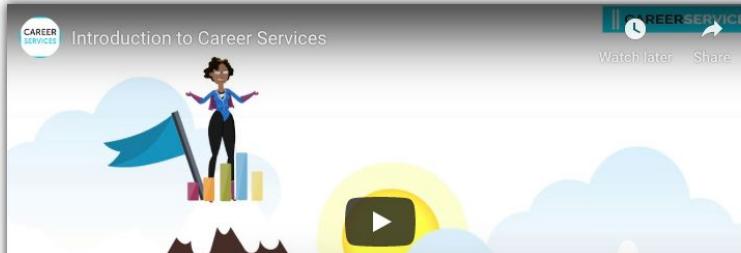
Milestone 1: Learn How to Become Employer-Competitive

"74% of recruiters believe hiring will become more competitive in the next 12 months."

[Jobvite Recruiter Nation Report 2018](#)

Key Takeaways

- By the end of this milestone, you will be able to articulate the difference between employer-ready and employer-competitive.
- Review this guide and then mark it as complete.
- Watch the following video introduction to Career Services



Submitting Milestones to Career Services

Getting Started

Your resume is your chance to impress an employer with your skills and accomplishments. An **employer-competitive** resume focuses on **results**, uses **dynamic language**, and appears **organized**, clean, and free of mistakes.

1. For a guided experience on developing your resume, view [Hack Your Resume](#) and [Hack Your Cover Letter](#) workshops.
2. If this is your first time developing a resume, use our '[Step-by-Step Guide](#)' for further support.



Resume Criteria

Use the following criteria to develop your resume.

Your career material advisor (formerly known as a profile coach) will use the same criteria when providing feedback.

Questions?



Add / Drop Date

09/24/21

Last day eligible for refund (if applicable)

Have questions after this session?

Email: jsusmarski@bootcampspot.com

Finance/General questions:

[**866-948-9237**](tel:866-948-9237), [**support@bootcampspot.com**](mailto:support@bootcampspot.com)

Install Night

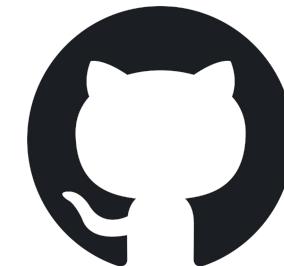
Accounts Created



LinkedIn



Slack



GitHub

GitHub

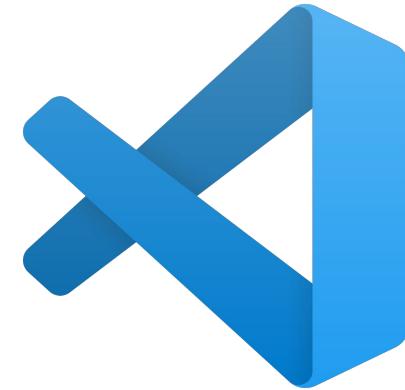
System Checks



Chrome



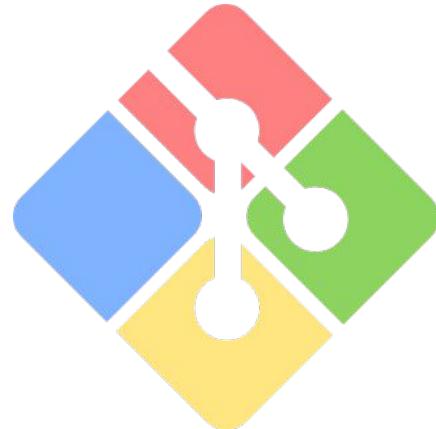
Slack



VS Code

System Checks

Windows



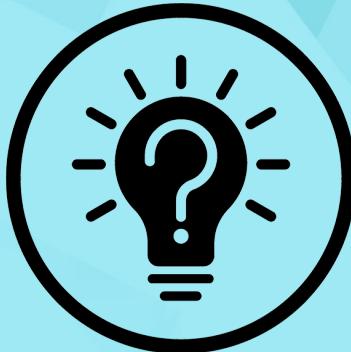
GitBash

macOS



XCode + Homebrew

Activity



**What was the finance world
Like in 1999?**



Activity: Rip Van Winkle

Rip Van Winkle is the story of a man who fell asleep right before the events of the American Revolution. He woke up 20 years later to find the world completely changed.

In this thought experiment, you will imagine what it would be like if Rip Van Winkle was a financial analyst who fell asleep in 1999 and woke up 20 years later.

Suggested Time:
10 Minutes



Activity Instructions: Rip Van Winkle

Apply the Rip Van Winkle story to FinTech by imagining if a financial analyst fell asleep in the year 1999 and woke up today. What would he or she find most surprising about the current finance world?



Define areas of finance that have been deeply affected by technology.



Name specific companies, products, or innovations that would be surprising to a financial analyst from 1999.

Suggested Time: 10 Minutes



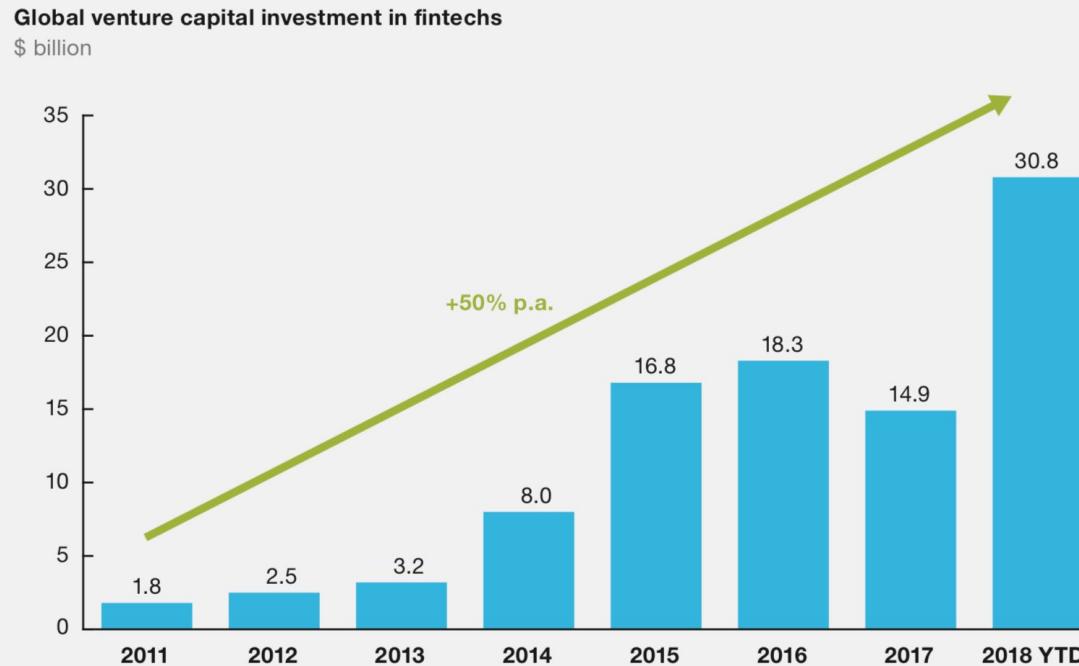


Let's Review

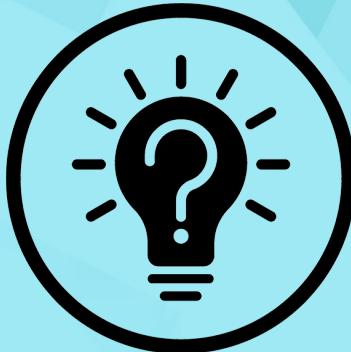
The Rise of FinTech

Global FinTech Investment Growth

FinTech investment has shown dramatic growth in recent years.



Source: CB Insights; McKinsey analysis



Why is FinTech such a  field of study these days?

The Driving Forces of FinTech

FinTech is driven by the same trends that dominate software and consumer technology.

Driving Technologies

Artificial Intelligence

Machine Learning

Big Data

Blockchain

Cryptocurrency

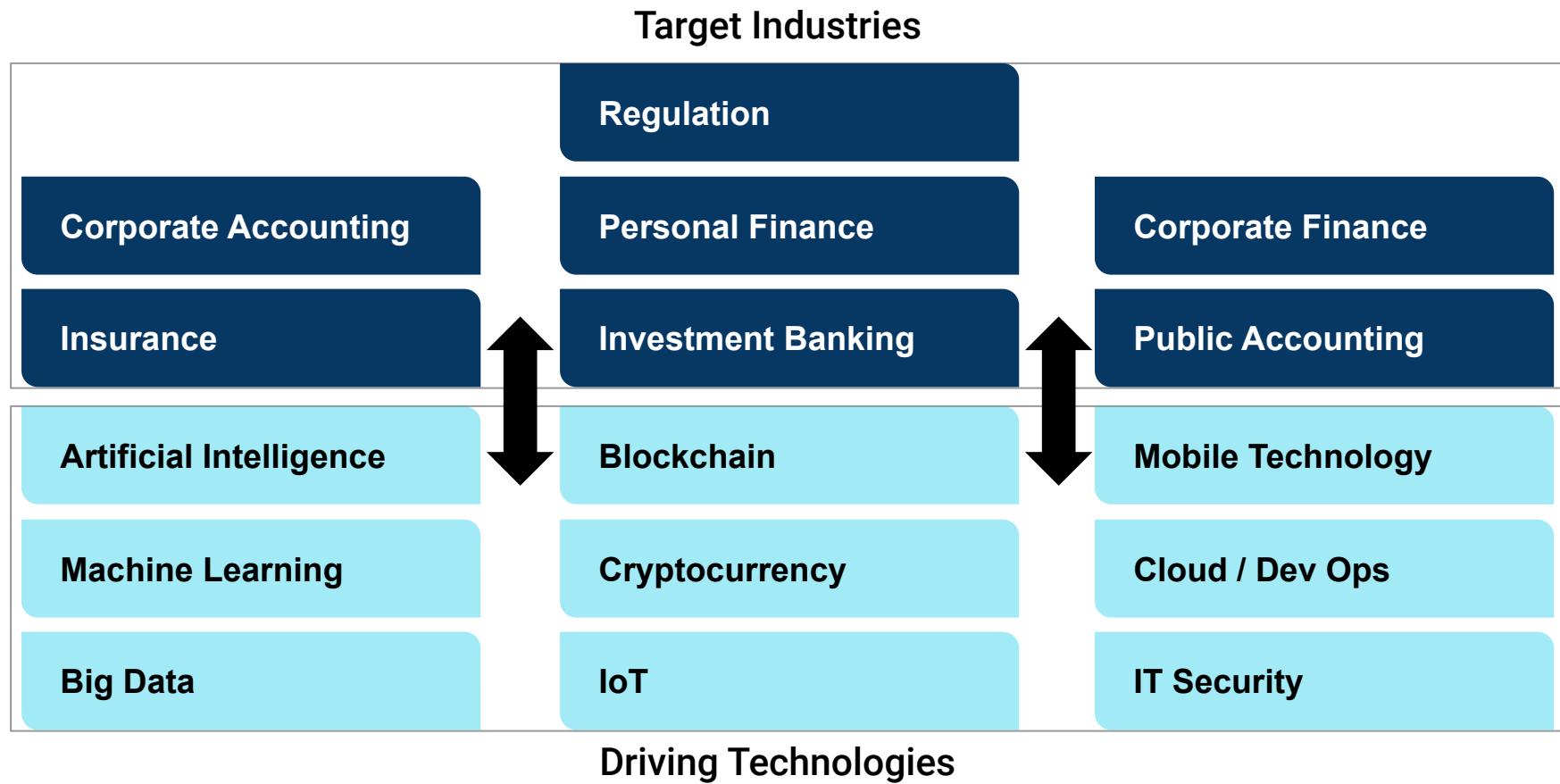
IoT

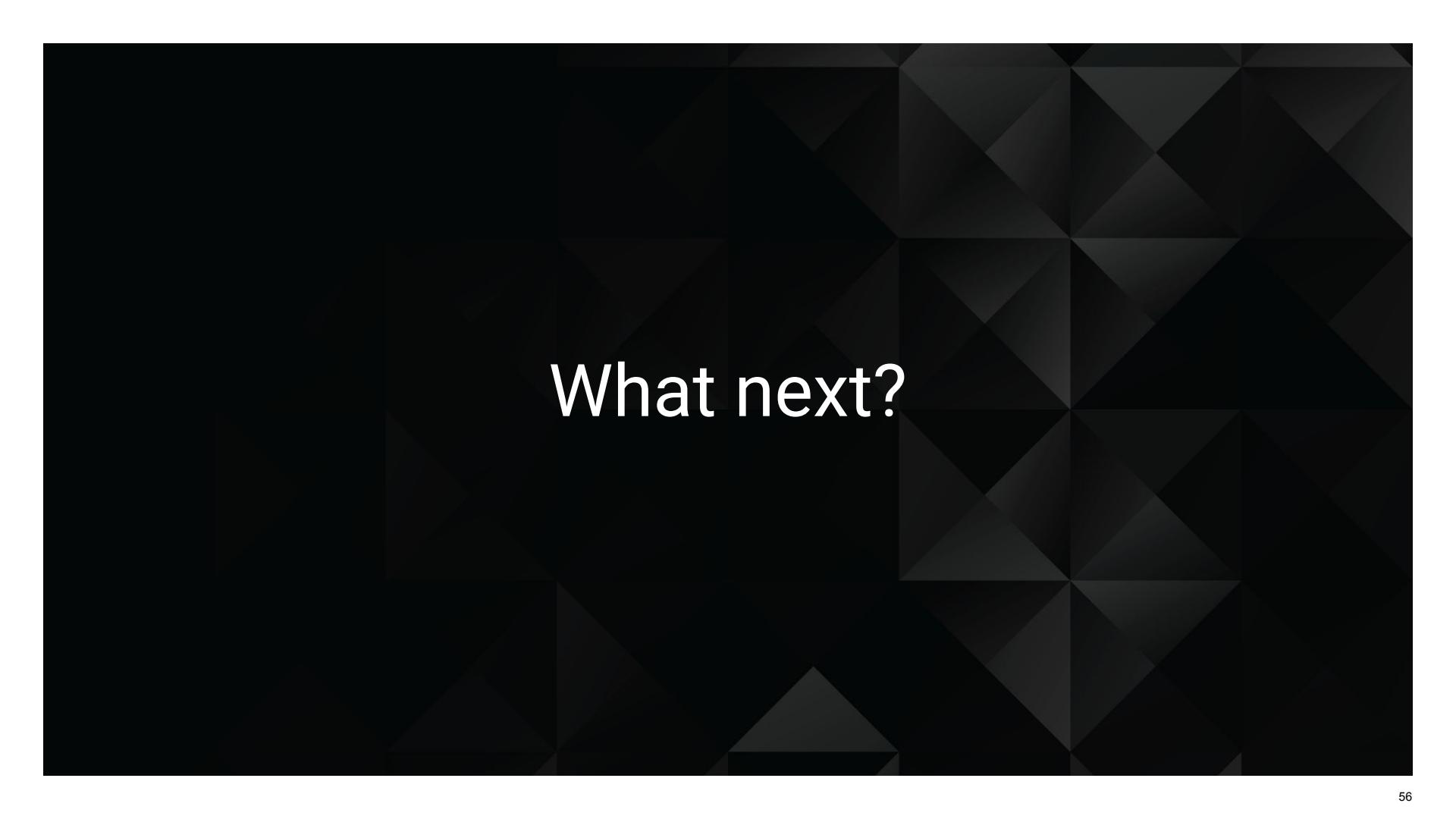
Mobile Technology

Cloud / Dev Ops

IT Security

The Driving Forces of FinTech





What next?

Next Steps

1. Review the Welcome Session Recap email you'll receive tomorrow:
 - a. Github/Gitlab instructions
 - b. Slack invite link
 - c. Recording from tonight
 - d. This presentation deck
2. Get started with the Onboarding Survey and Module 1 Lessons on Canvas
3. Attend Install Weekend with the TAs starting Friday evening
4. Come to your Virtual Classes next week on **Tuesday** and **Thursday**