

# ANALYST HIRING PACKAGE



UBC'S PREMIER CAPITAL MARKETS CLUB



[westpeakresearch.com](http://westpeakresearch.com)



WestPeak Research



@westpeakresearch

# LETTER FROM OUR DIRECTORS

Prospective Junior and Senior Analysts,

At WestPeak Research Association, our mission is to bridge the gap between academic learning and real-world financial markets. Since our founding in 2014, we have been committed to fostering an environment where ambitious students can thrive through peer mentorship and structured training seminars.

As a student-run organization, we pride ourselves on the quality of our research and the professional development opportunities we offer our members. Our approach combines rigorous technical training and professional development, preparing our members to excel in competitive internships and full-time roles at leading financial institutions around the world. Our alumni network spans across prestigious firms such as Goldman Sachs, Blackstone, Citadel, and Moelis & Company, to name a few.

We believe that the success of our members is a testament to the value of our program. We invite you to join our community of dedicated and ambitious individuals and build your career with us.

If you are an ambitious student looking to advance your career in finance, we encourage you to apply to our Junior or Senior Analyst programs. We look forward to the possibility of working together.

Sincerely,



**Benjamin Siem**  
4th Year BCom



**Eden Vasica**  
4th Year BIE



**Shivani Aggarwal**  
3rd Year BCom

# WHAT IS WESTPEAK?

## About Us

Established in 2014, WestPeak Research Association is a student-led capital markets group dedicated to producing high-quality equity research and enhancing the education of its members through active peer mentorship and structured training seminars.

WestPeak's mission is to nurture students' "spark" for finance, whether they are new to university and discovering their passion for markets or are seniors with prior internship experience. To achieve this, WestPeak offers two distinct programs. The Junior Analyst program takes students from zero to one in their finance journey, introducing the fundamentals of accounting, valuation, and research through hands-on experience writing equity reports and weekly training seminars. The Senior Analyst program targets students with existing experience in the capital markets, helping them develop advanced technical skills and industry-specific expertise. Senior Analysts are placed into one of four industry groups and write industry-specific equity research reports while learning from our Group Heads, who have real-world experience in the industries they teach.

WestPeak has published 160+ research reports and placed over 100 alumni in leading financial institutions around the world. Our extensive network spans major financial hubs, including London, Los Angeles, New York, Hong Kong, Toronto, Vancouver, and Calgary.

## Select Alumni Placements



# WESTPEAK BY THE NUMBERS

**#1**

Capital Markets Club in  
Western Canada

**~10**

Years Since Inception

**~170**

Equity Research Reports  
Published

**100+**

Alumni

**25%**

International Placements

**~70**

Institutions Placed

## Our Alumni

WestPeak Research Association Alumni are making their mark across key global financial hubs including Los Angeles, New York, London, Toronto, San Francisco, Menlo Park, and beyond. Our graduates excel in a diverse range of roles such as Investment Banking, Private Equity, Asset Management, Equity Research, Consulting, and more.



# JUNIOR ANALYST PROGRAM

## Program Overview

The Junior Analyst position is for those who are passionate about finance with a high willingness to learn. We encourage individuals who are interested in exploring the different areas in capital markets and expanding their understanding of fundamental finance knowledge to apply to the Junior Analyst program. This program is open to all years and all faculties and is recommended for those with little technical knowledge.

**Time Commitment:** 10 hrs / week

## What We Offer

- A series of modules on topics including valuation, investing philosophy, and financial modelling to build an extensive understanding of fundamental capital market concepts.
- Exclusive networking sessions held with industry professionals and alumni working in investment banking, sales and trading, asset management, private equity, and more.
- Comprehensive mentorship program where select Junior Analysts get paired with accomplished and experienced industry professionals in their field of interest working at one of the best financial firms in North America.

## What You Will Do

- Using an investor mindset, the Junior Analyst will produce two in-depth equity research reports on publicly traded companies of their choice, using concepts learned from the modules. The first report will be on a company within the Consumer Retail sector. For the second report, analysts have the discretion to choose a company within the Natural Resources, Alternative Assets, Consumer Retail and Technology, Media & Telecommunications sectors. Examples of these reports can be found on our website.
- Split off into teams, Junior Analysts will present stock pitches to compete in the annual WestPeak Internal Stock Pitch Competition judged by alumni and industry professionals.

**Application Process:** Please apply for the Junior Analyst program [here](#) by Friday, September 20th at 11:59 pm PT. Please include your resume, cover letter, and unofficial transcript in one PDF document with the following naming convention: JA\_FirstName\_LastName (e.g. JA\_Jane\_Smith).



# SENIOR ANALYST PROGRAM

## Program Overview

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Building on foundational capital market concepts, Senior Analysts will have an opportunity to dive deeper into an industry of their choice.

For the Senior Analyst program, we look for students in their second year or older with previous experience in finance and basic knowledge of accounting, valuation, financial modelling, and academic writing.

**Time Commitment:** 10 hrs / week

## What We Offer

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- A series of modules on advanced finance topics relevant to the Senior Analyst's industry group, which might include industry overview, industry-specific valuation techniques, sector-specific technical preparation, recruitment, and more.
- Networking sessions held with industry professionals and alumni working in investment banking, sales and trading, asset management, private equity, and more.
- Exclusive mentorship program where Senior Analysts get paired with experienced and accomplished professionals in a role relevant to their career aspirations and interests. They will simultaneously mentor a Junior Analyst to guide them in their field.

## What You Will Do

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As part of their coverage team, Senior Analysts will produce two equity research reports on companies of their choice. The reports will be brief, with a strong emphasis on the investment thesis and financial model. Senior Analysts will select their stock from one of the following groups: Natural Resources, Alternative Assets, Consumer Retail and Technology, Media & Telecommunications. At the end of the term, Senior Analysts will pitch their stock to the Investment Committee to receive feedback and guidance before the reports get published.

**Application Process:** Please apply for the Senior Analyst program [here](#) by Friday, September 20th at 11:59 pm PT. Please include your resume, cover letter, and unofficial transcript in one PDF document with the following naming convention: SA\_FirstName\_LastName (e.g. SA\_Jane\_Smith).

# MANAGEMENT TEAM



**Benjamin Siem**  
Director



**Eden Vasica**  
Director



**Shivani Aggarwal**  
Director



**Gustavo Gongora**  
Vice President



**Hilary Lau**  
Tech Director



**Raghav Bhatia**  
Vice President

## Current Management Placements

**BlackRock**

**BCI**

**CIBC**

**JARISLOWSKY FRASER**  
GLOBAL INVESTMENT MANAGEMENT

 **LONGBOW  
CAPITAL INC.**

 **RBC**  
Capital  
Markets

 **Scotiabank**

 **TD** **TD Securities**

# GROUP HEADS

## Alternative Assets



Tony Liaw  
Group Head



Rex Cheung  
Group Head

## Consumer Retail



Catherine Wang  
Group Head



Leonard Wang  
Group Head

## Natural Resources



Josh Bianchini  
Group Head



Benjamin Carter  
Group Head

## Technology, Media & Telecom



Bob Han  
Group Head



Anne Zhou  
Group Head

## Current Group Head Placements



Morgan Stanley





**Get in Touch!**

**contact@westpeakresearch.com**



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