

## WHAT WE DO

WestPeak Research Association (“WestPeak”) is a student-run capital markets group that aims to create quality equity research while enriching the education of its members through active peer mentorship and structured training seminars. We seek to prepare our members with the necessary skills required for success in the capital markets.

## WHAT WE LOOK FOR

We are looking for students with a high willingness to learn and an interest in the capital markets. Our ideal students are driven, self-starters who are able to take the material they learn to the next level. In the past, our most successful analysts have been those with unwavering curiosity and eagerness to explore topics related to financial markets. Students with an interest in pursuing a career in the capital markets industry are encouraged to apply.

## WHAT WE OFFER

When you join WestPeak, you are joining a community of current members and alumni that are as driven and like-minded as you. You will have access to exclusive training modules and resources designed to help you learn finance concepts and develop skills needed within the capital markets. Through your deliverables, you will gain valuable research, analytical, and financial modelling skills. Aside from the learning, you will also gain access to mentors and networking sessions held with industry professionals and alumni working in investment banking, sales and trading, asset management, wealth management, and more.

**Expansive Network of  
Members and Alumni**

**Company Valuation Skills**

**Equity Research/Stock  
Pitch Experience**

**Financial Modelling Skills**

**Industry Guest Speakers**

## OVERVIEW OF JUNIOR AND SENIOR PROGRAM

This year, we are expanding our program to include a structured program for both juniors and seniors. Historically, we have only run the Junior Analyst program, which taught members the capital markets fundamentals and how to write an equity research report. Recognizing that there are students with more extensive prior experience in finance, we developed the Senior Analyst program to allow those to take an in-depth approach and specialize in a specific industry.

## 2020/2021 HIRING PROCESS

**Dates:** Applications open on Friday, September 4<sup>th</sup>, 2020 and close on Sunday, September 27<sup>th</sup>, 2020. Decisions for both cohorts will be made in early October.

**Process:** The first round will include a cover letter, resume, and unofficial transcript submission. Chosen applicants will advance to an interview round.

## JUNIOR ANALYST PROGRAM

### Overview

- The Junior Analyst position is for those who are passionate about finance and interested in exploring different fields in the capital markets and expanding their understanding of fundamental finance knowledge

### Who we look for

- The Junior Analyst position is open to all years and recommended for those who want to build a strong foundation in finance and have a demonstrated interest in the capital markets
- Students who are driven, self-starters who are able to take the material they learn to the next level

### What you will learn

- A series of modules on topics like financial accounting, valuation, investing philosophy, and financial modelling to build an extensive understanding of fundamental capital markets concepts

#### Select Training Modules

Introduction to Capital Markets

Financial Accounting

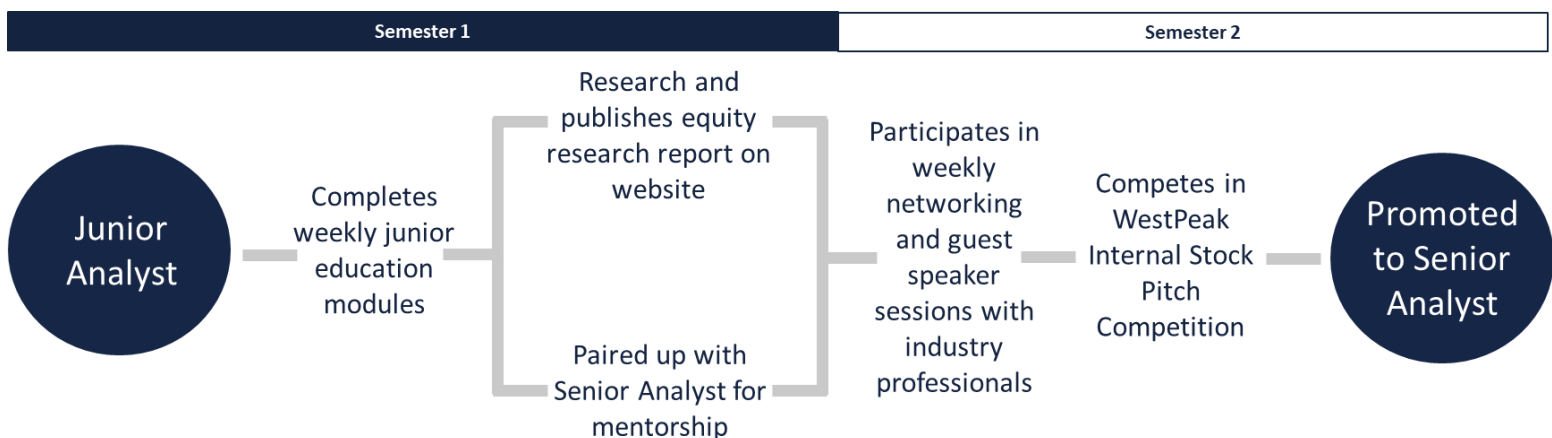
Basics of Valuation

...and more!

### What you will do

- Using a structured research framework, the Junior Analyst will produce one in-depth equity research report on a publicly traded company of their choice, using concepts learned from the modules. Example of these reports can be found on our [website](#)
- Junior Analysts will present a stock pitch to compete in the annual WestPeak internal stock pitch competition, judged by alumni and industry professionals

### Structure and timeline



## SENIOR ANALYST PROGRAM

### Overview

- Build on foundational capital markets concepts, Senior Analysts will have an opportunity to take a deeper time into an industry of their choice. Together with other members on their coverage team, Senior Analysts will work together to research different opportunities and publish their findings

### Who we look for

- Students in their second year and above, who have had previous experience in finance (through internships, case studies, classes, etc.)
- Basic knowledge of accounting, valuation (DCF & Comps), financial modelling, and academic writing

### What you will learn

- More advanced concepts on valuation methodologies and modelling, and more (see table on right)
- In-depth industry expertise, including but not limited to
  - Consumer Retail
  - Natural Resources
  - Real Estate
  - Technology, Media, Telecommunications

#### Select Training Modules

Mergers and Acquisitions

Private Equity

Credit

...and more!

### What you will do

- Produce an industry primer with your team
- Produce a report on a topic of your team's interest, including but not limited to hypothetical M&A, leveraged buyout, special situations, and equity research reports
- Present your research to a panel of your peers and defend your thesis and analysis

### Structure and timeline

