Please fill out the sections labeled **action required** ASAP.

[About Page](#_tk4pejz1tr27)

[Action Required](#_1d9vf4t5kogm)

[Success Stories](#_puqnxenzwxeg)

[Action Required](#_w75mlzesd6qr)

[Action Required](#_i98eltbgynhx)

[Sponsors](#_rrq1iyaje68s)

[Action Required](#_1kv66crz92hf)

[PRIORITY: Executive Team/Leadership](#_6l8rts4qa1m5)

[Action Required](#_cdcogv7f81j8)

[Action Required](#_992or4np3esw)

[Action Required](#_44cvyi9xb3rs)

[PRIORITY: Recruiting](#_dhqglhaq5x5u)

[Action Required](#_slqrwgaepzxi)

[Action Required](#_bimpvgergqso)

[Google Calendar](#_l953uogua9be)

## About Page

### Action Required

Please fill out the columns seen on this page:

https://187b-vqdo1.c9.io/app/about

~~Under “Who We Are”: "We prepare students to excel in every industry through extensive training in network management, resume workshops and interview preparation"~~

~~a~~

~~I would prefer to keep it “Our Focus”, as it is on our current live site with the following text:~~

The Undergraduate Investment Society (UIS) strives to empower UCSD students and the San Diego community with financial literacy and investment knowledge to create successful future leaders in the business world. We aim to bridge the gap between the ivory tower and the Street.

We implement this goal by providing value-added financial seminars, impactful networking events with industry professionals, and mentorship programs through UIS and our sister organization, the Financial Professionals Network.

We are proud to host the school's largest annual finance conference, the Financial Horizons Conference that, in the past 9 years, has seen an increase of professional, student, and alumni attendees. The Undergraduate Investment Society holds the highest standards for its committee members, meetings, and events to ensure that quality is consistent with the expansion of the organization's success. We continuously evolve by building bridges with corporations, community leaders, and other prominent figures within the financial world.

## Success Stories

### Action Required

We talked about featuring **2-3 people** who have been placed at great companies.

Do you need pictures of these people or no?

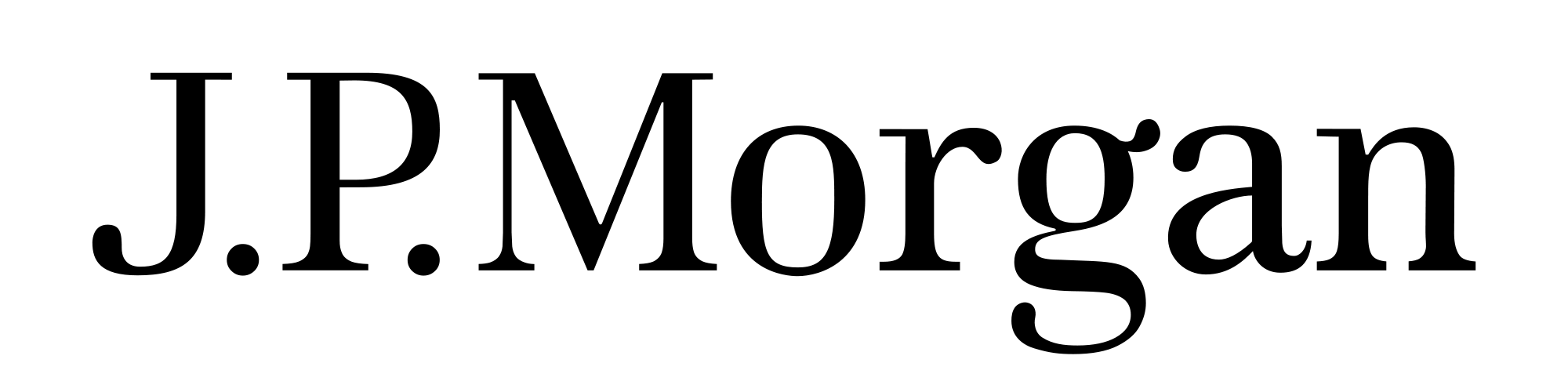
|  |  |  |
| --- | --- | --- |
| **Name** | **Company** | **Insightful quote or description.  Info like:** grad date, major, etc. |
| **Nabil Hamade** | **JP Morgan** | **My name is Nabil Hamade and I am currently a sophomore attending the University of California San Diego. Finance is my passion, and I am hoping to work in investment banking upon graduation. Currently, I am supplementing my academic work with an internship at a middle-market investment bank called RA Capital Advisors in Del Mar. It has been great learning about the deal-making process both on a macro level, as well as diving into the nitty-gritty of the technical analysis needed to value a company. In the Spring, I will be joining a growth equity firm called JMI Equity, where I look forward to covering the technology industry (with a software focus). I will be interning at the Sales and Trading Department of JP Morgan in Los Angeles during summer of 2015.**  **The Undergraduate Investment Society was first introduced to me through the Financial Horizons Conference my freshman year. Such a successful event left me yearning to join this group, as it became clear to me that they were a unique set of individuals on the UCSD campus. Through UIS, I have not only gotten exposure to technical training, essential soft skills, as well as alumni connections, but I have also gotten the opportunity to become very close friends with like-minded students. My peers in UIS serve as a source of motivation, as well as an underpin to lean on; I can say with confidence that joining this organization has been one of the essential elements of my undergraduate experience.** |
| **Janis Ho** | **JP Morgan** | Third Year  Mathematical Economics Major, Business Finance Minor    Born and raised in Hong Kong, I aspire to break into the world of investment banking ever since my participation in an investment competition in high school. In the past years, I have held internships in boutique wealth management and brokerage firms. As an international student from a non-target university, I have to work extra miles to achieve my goal. Being a part of UIS, I witness myself grow both personally and professionally. My mentors guided me along the journey of jobs search, professional networking and interview rounds. Most importantly, I became capable of presenting myself in a confident manner. This summer, I will be a Summer Analyst at J.P Morgan Prime Trading Division in Hong Kong. |
| **Jeffrey Shu** | **Barclays** | **I am a third year International Studies Economics Major with a Minor in Business Finance. This past summer I studied abroad at Fudan University in Shanghai while working at Ivy Capital, a private equity shop. Currently I am a teaching assistant through the Rady School of Management. This upcoming summer I will be working as a summer analyst with Barclays Investment Bank in their TMT group based out of Menlo Park. I was also part of the UCSD Track and Field team throwing shot put and discus for two years. In my spare time I enjoy playing basketball and taking adventures around San Diego.** |
| **Jiayi Zeng** | **UBS** | **Jiayi Zeng has held internships at a private equity firm and a Swiss private banking firm. Prior to college, Jiayi worked as a full-time financial consultant at a precious metal trading company for nearly one year. Jiayi has a genuine interest in finance and is pursuing opportunities in investment banking, private equity and hedge funds.**  **During the summer of 2015 he will be working as an Investment Banking Summer Analyst at UBS in Hong Kong.** |
| **Brian Dzou** | **JP Morgan** | **Brian Dzou has held internships at a private investment bank in San Diego and an M&A advisory firm in Newport Beach. He is pursuing career opportunities at bulge bracket investment banks.**  **This summer Brian will be working as an Investment Banking Summer Analyst for the TMT Group of JP Morgan in San Francisco during summer of 2015** |
| **Jason Masong** | **Credit Suisse** | **Investment banking hopeful with a particular interest in the food and beverages industry. Interest sparked from following fast-casual restaurant IPOs in the United States and deals within the fast-moving-consumer-goods (FMCG) sector in Asia.**  **Past experiences include prep cooking and doing inventory at a hotel to gain a "bottoms-up" understanding of the industry. Became involved with financial/equities analysis through a student-run endowment at UCSD where he presented on (SBUX, BWLD,DNKN, and SYY). This summer he was an M&A and Valuation intern at E&Y as well as a summer associate at an independent equities research firm specializing in consumer retail and TMT.**  **During the summer of 2015 Jason will be working as an Investment Banking Summer Analyst at Credit Suisse in Singapore** |
|  |  |  |

Please provide a list of companies.

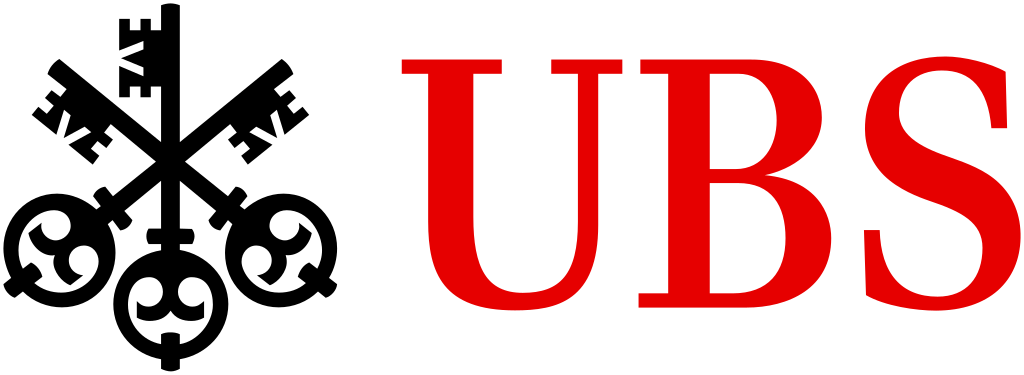
**LionTree, LLC**

****

**JP Morgan (not the Chase logo)**

****

**UBS**

****

**RBC Capital Markets**

****

**Citibank**

****

**Credit Suisse**

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**Barclays**

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**RA Capital Advisors**

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**JMI Equity**

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**Brandes**

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**Accenture**

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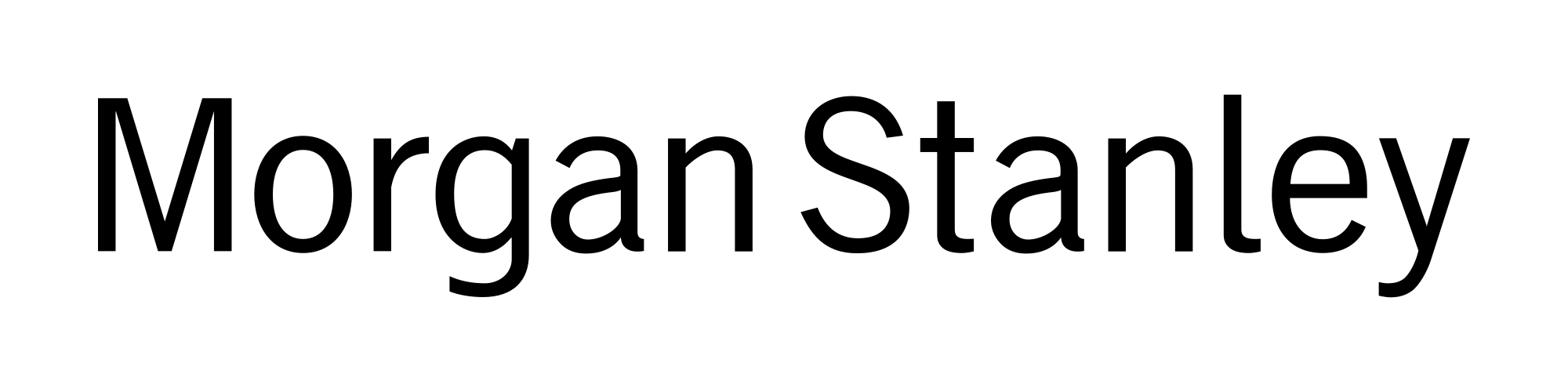
**Yahoo**

****

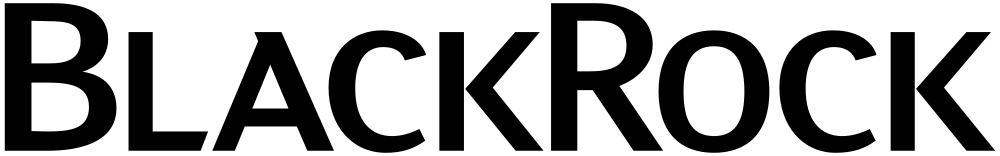
**CapitalOne**

****

**Morgan Stanley**

****

**BlackRock**

****

**CoinBase**

****

**Sierra Ventures**

****

**Bank of America Merrill Lynch**

****

**Wells Fargo Securities**

****

**Guggenheim Securities**

****

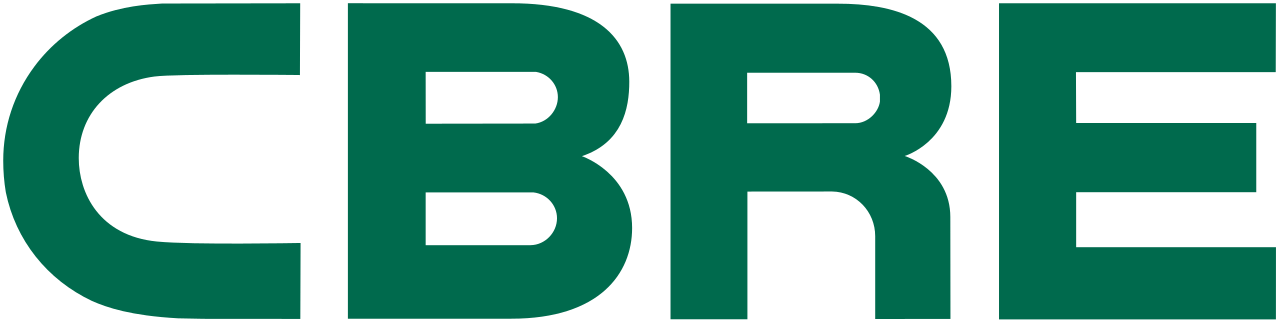
**KPMG**

****

**Deloitte Consulting**

****

**CBRE**

****

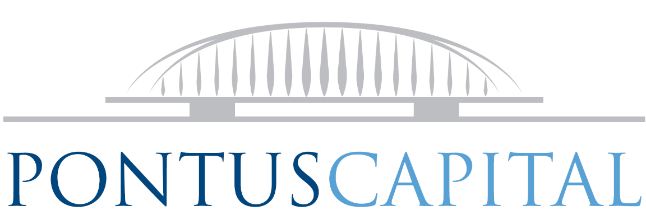
**AXA Advisors**

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**NBCUniversal**

****

**Pontus Capital**

****

## Sponsors

<http://2017.tedxucsd.com/index.php/sponsors/>

UCSD Economics Department



Rady School of Management



UCSD Alumni



CFA Society San Diego



Kaplan Schweser



Wells Fargo



Whole Foods



Chase



Peet’s Coffee & Tea



Einstein Bros Bagels



Starbucks Coffee



## PRIORITY: Executive Team/Leadership

### Action Required

1-2 paragraphs MAX that explains the purpose of this page. Explain how your organization structures members/leadership roles, etc.

I don’t think it is necessary to include role descriptions. We can just leave the website as it is with the pictures + linkedin

### Action Required

Page contains photos and bios of the officers. Please fill out this table.

http://speckycdn.sdm.netdna-cdn.com/wp-content/uploads/2013/12/06-betaworks-team-webpage.jpg

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Role** | **Description (~ 250 characters max)** | **LinkedIn URL** |
| Samuel Hong | President | The President is the face of UIS and bears responsibility for the organization. The President provides strategic vision for the society as a whole, support to the Vice Presidents and guidance to officers. | https://www.linkedin.com/profile/view?id=132928891&authType=NAME\_SEARCH&authToken=CFQr&locale=en\_US&trk=tyah2&trkInfo=idx%3A2-1-2%2CtarId%3A1425106898897%2Ctas%3Asam |
| Michelle Sou | Senior Vice President |  | https://www.linkedin.com/profile/view?id=278037322&authType=NAME\_SEARCH&authToken=NXr5&locale=en\_US&trk=tyah2&trkInfo=idx%3A1-1-1%2CtarId%3A1425106935642%2Ctas%3Amichelle+sou |
| Jiayi Zeng | VP Internal | Internal group is the backbone of UIS. The VP Internal is responsible for overseeing daily operations of the organization and facilitating internal collaboration between different committees. | https://www.linkedin.com/profile/view?id=296094020&authType=NAME\_SEARCH&authToken=gtm-&locale=en\_US&trk=tyah2&trkInfo=idx%3A1-1-1%2CtarId%3A1425106946666%2Ctas%3Ajiayi |
| Mohammed Alyasini | Co-VP Research and Education |  | https://www.linkedin.com/profile/view?id=178889594&authType=NAME\_SEARCH&authToken=shJR&locale=en\_US&trk=tyah2&trkInfo=idx%3A2-1-2%2CtarId%3A1425106957815%2Ctas%3Amo |
| Giovanni Ugut | Co-VP Research and Education |  | https://www.linkedin.com/profile/view?id=204772391&authType=NAME\_SEARCH&authToken=gFXN&locale=en\_US&trk=tyah2&trkInfo=idx%3A2-1-2%2CtarId%3A1425106968096%2Ctas%3Agio |
| Jason Masong | Co-VP External - Sponsors | Vice President of External : Accountable as the Director of Speakers and Director of Sponsors. Targets local and national firms to develop partnerships, while seeking potential speakers and sponsorship for annual Financial Horizons Conference. Works directly with affiliate student organizations, faculty and administration, and industry professionals establishing and managing relations. | https://www.linkedin.com/profile/view?id=212854456&authType=NAME\_SEARCH&authToken=0mva&locale=en\_US&trk=tyah2&trkInfo=idx%3A1-1-1%2CtarId%3A1425106980416%2Ctas%3Ajason |
| Jocelyn Ueng | Co-VP External - Speakers | Same as above | https://www.linkedin.com/profile/view?id=152893069&authType=NAME\_SEARCH&authToken=W5an&locale=en\_US&trk=tyah2&trkInfo=idx%3A1-1-1%2CtarId%3A1425106998725%2Ctas%3Ajocelyn |
| Domminick Suvonnasupa | Director of Campus Relations |  | https://www.linkedin.com/profile/view?id=254582456&authType=NAME\_SEARCH&authToken=FRXh&locale=en\_US&trk=tyah2&trkInfo=idx%3A2-1-2%2CtarId%3A1425107019019%2Ctas%3Adom |
| Dorothy Chow PHOTO  Photo incoming tonight | Director of Marketing |  | https://www.linkedin.com/profile/view?id=235938948&authType=NAME\_SEARCH&authToken=VVR4&locale=en\_US&trk=tyah2&trkInfo=idx%3A1-1-1%2CtarId%3A1425107028534%2Ctas%3Adoro |
| Jeffrey Shu | Director of Human Resource and Technology | Human resources, to take an significant role in the fall and spring recruiting along with help the internal team with any other matters that need to be taken care of. | https://www.linkedin.com/profile/view?id=167809577&authType=NAME\_SEARCH&authToken=Fm-T&locale=en\_US&trk=tyah2&trkInfo=idx%3A1-1-1%2CtarId%3A1425107040670%2Ctas%3Ajeff |
| Roohani Arora PHOTO  Photo incoming tonight | Director of Finance |  | https://www.linkedin.com/profile/view?id=306432431&authType=NAME\_SEARCH&authToken=xp2q&locale=en\_US&trk=tyah2&trkInfo=idx%3A1-1-1%2CtarId%3A1425107051429%2Ctas%3Arooha |

### Action Required

Please **provide photo**s of all or most officers. You can share a dropbox or google drive with us.

[**https://www.dropbox.com/home/UIS%20Exec%20Photos**](https://www.dropbox.com/home/UIS%20Exec%20Photos)

**Victoria, please give me your email address so that I can share this folder with you. Thanks**

**More Information Needed**

Other important aspects of your member structure. e.g. Names of non-officer members? Officer applications?

**Hey guys, I bolded names that I have not seen in a while, please decide if they should be on the list. Also, please add the new members who joined off-cycle as well as in Fall.**

|  |  |
| --- | --- |
| Theresa Wong | External Committee Member |
| Nabil Hamade | External Committee Member |
| Shawn Jubran | External Committee Member |
| Christian Rock | External Committee Member |
| Bryan Guan | External Committee Member |
| Niki Mahurin | External Committee Member |
| Jerry Chu | External Committee Member |
| kam Yan Ho(Janis) | External Committee Member |
| Dana Webster | External Committee Member |
| Leo Yang | External Committee Member |
| Sarah Yeung | External Committee Member |
| Ellen Kim | External Committee Member |
| Katherine So | External Committee Member |
| Kimberly Phan | External Committee Member |
| Lim Nhep | External Committee Member |
| Diego Ruju | External Committee Member |
| Tian Leng | Research & Education Committee Member |
| Michael Ma | Research & Education Committee Member |
| Chris Barnes | Research & Education Committee Member |
| Chris Hermandez | Research & Education Committee Member |
| Alexey Voronin | Research & Education Committee Member |
| Timothy Huang | Research & Education Committee Member |
| Amanda Fong | Research & Education Committee Member |
| Jose Pedro Cachedo | Research & Education Committee Member |
| Siyang Wang | Research & Education Committee Member |
| Kyle Yu | Research & Education Committee Member |
| Brian Dzou | Research & Education Committee Member |

## PRIORITY: Recruiting

### Action Required

Description - 1-2 paragraphs MAX of how UIS does recruiting, things the user needs to know about the recruiting process.

UIS recruits new officers in Fall and Spring Quarters each year. Please join our first GBMs in those quarters to find out more about UIS and details of the recruiting process. A copy of your updated resume, cover letter as well as your latest transcript are required to submit the application. Shortlisted candidates will be invited to interview after we carefully review each application. You do NOT have to have previous experience in Finance to get into UIS. However, be sure to read our website and talk to as many UIS members as possible to find out more about us before going into the interview.

### Action Required

**Steps to become a member?**

Example:

1. Fill out a form
2. Come to a GBM
3. Submit your resume to blah blah blah

Steps:

1. Check out our introductory GMBs in first few weeks of each Fall or Spring
2. Speak to as many current UIS members as possible to learn more about us
3. Fill out an application and get your resume ready to be sent to [uis.ucsd@gmail.com](mailto:uis.ucsd@gmail.com)
4. Schedule an interview with us and you will hear back as soon as we have a decision for you

**Positions available?**

Candidate could apply to External, Research & Education, or both.

**More Information Needed**

Applications?

Deadlines?

## Google Calendar

**Adding Events**

When adding events to the calendar,

1. Fill out the title, date, time, and (optional) a short description
2. **Include a link to the facebook event in the description** **if one exists**.