



Finance

School of Business

Kanbar College of Design, Engineering, and Commerce

Presentation Overview

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Tim Mooney, PhD

AREA COORDINATOR, FINANCE MAJOR



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Finance program prepares students for successful professional careers by offering a curriculum focused on its application to finance industry practice, answering the question: “How is this used in the real world?”

- All finance majors are required to take an active role in overseeing the Student Managed Investment Fund to ensure **hands-on involvement**
- **Quantitative emphasis** on data analytics and financial modeling
- Learn from **expert faculty** with advanced degrees, certifications and professional experience
- Option to **Accelerate** and complete the degree in 3-years
- **Industry visits** to companies in Philadelphia and New York
- **Engage** with student lead Finance Literacy Club

PLAN OF STUDY

Hallmarks Core (31-33 cr.) - a cumulative general education that builds essential skills to prepare you for your career.

Design Engineering Commerce Core (12 cr.) - introduces the principles and practice of innovation drawn from design thinking principles to identify opportunities and discover creative solutions to complex problems in a collaborative environment.

Major (18 Cr.) - Gain expertise in Finance with advanced electives such as financial markets and instruments, corporate finance, investments, financial modeling, Seminar in Finance.

Business Core (39 cr.) - integrates key functional areas of business and provides a strong foundation for finance major and assuming leadership roles.

Applied Business Analytics Core (included in Business Core) - provides cutting edge knowledge and skills to identify, understand, and deliver insights from large datasets.

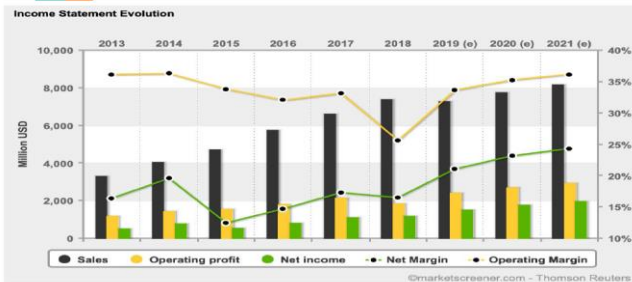
Free Electives (12 cr.) - can also be used to pursue a minor and/or internships.

Student Investment Fund Group project

American Tower Corp.

Fund purchased in April 2019 for \$198.43 per share; Stock reached \$256 in February 2020

Analysis



Target Price

Target Price of \$231.35 within the next 24 months. This target price would represent an approximate 22% increase from the current stock price of \$192.32.



AMERICAN TOWER
CORPORATION

PLACEMENT RATE

95%

RANKINGS

#15 in the region
5 Most Innovative University
A BEST Value University
(US News and World Report,
2018)

STUDY ABROAD

London
Paris
Rome

EMPLOYERS OF JEFFERSON GRADUATES

VANGUARD
SEI
COMCAST
PNC

VERIZON
LINCOLN FINANCIAL
JPMorgan
Citizens Bank

Selected 2018-19 internship placements:

TD Bank, New York Life Insurance, Pfizer

Selected 2018-19 career placements / titles:

Vanguard Group - Operations Associate

Rabobank Nederland - Portfolio Officer

SEI Investments - Budget Analyst

Salary range: \$40,000 to \$67,000



STUDENT PROFILE

Rosario Tineo

CLASS OF 2020

FINANCE MAJOR

International Business MINOR

“My classes, along with my general business classes, challenged my creativity in ways that it hasn't ever been before. I've loved getting to know both the students and professors involved in my major. The small class sizes facilitate a great relationship with the professors, and all of my professors have shown that they genuinely care about the success of our futures.”

I advise anyone interested in pursuing a business degree at Jefferson to get to know your professors. They are all helpful in so many ways, whether you need help figuring out what you want to do after you graduate, or simply just help with a homework assignment.

Michael Rodriguez

CLASS OF 2021
FINANCE MAJOR

“I am associated with the Gateway to Leadership Program and SEO Program, which are selective initiatives that select high-achieving minority students with a strong interest in investments and/or financial services. I recently accepted an internship position with Aberdeen Standard Investments”.

“I value enormously the relationships I developed with my professors. A few classmates and I successfully launched a financial literacy initiative on campus “Jeff Invest”. Our professors assisted us with promotion, resources, connections, etc. I advise anyone interested in pursuing a business degree at Jefferson to cultivate genuine relationships with your professors. They truly care about student success and professional growth”



Shawn Johnson

CLASS OF 2021

My first three years at Jefferson were full of challenges and surprises. These situations pushed me to grow, both as a student and a person. Many times, my Professors were behind me in support of these challenges I faced, showing how much they care.

My advice would be to get involved as much as you can, both on and off-campus. This will put you in the position to connect and build relationships, which is critical in business and this program. I assure you, time will fly, and it's the opportunities you seize during this time that you will remember.



Dr. D.K. Malhotra

FINANCE, PROFESSOR

PhD, The University of Alabama

D.K. obtained his PhD in finance from The University of Alabama. His research has appeared in several outlets, including the *Journal of Financial Research*, *Financial Review*, *European Journal of Operational Research*, *Omega—The International Journal of Management Science* and has won several national and international awards for his research.

COURSES

- FINC-301 FINANCIAL MANAGEMENT
- FINC-321 INVESTMENTS AND PORTFOLIO MANAGEMENT
- FINC-318 INTERNATIONAL FINANCE
- FINC-412 FINANCIAL MODELING

Orlando Esposito, MBA, CPA

Executive VP (Retired)

Adjunct Professor



Following graduation from Philadelphia University, Esposito went to work with Deloitte, which provides audit, financial advisory, tax and consulting services to its clients. He wanted to be more than an auditor and that led him to use his accounting background to help companies grow, which is what led him to banking. Esposito recently retired as EVP of PNC Financial Services Group and the CEO of asset management group with over \$270 billion of investments.

“Excited to be back, the focus at Jefferson Business School is equally on acquiring skills, but also on learning how to ask the questions that will enlighten solutions to the challenges of tomorrow”.



Rebecca Kennedy

Finance Director, Vanguard

CLASS OF 2009
FINANCE MAJOR

“The business school professors play a key role in the success of my career - they helped shape my aspirations, they influenced how I navigated career opportunities and challenged me to have a broad and global perspective. The real-life application was most valuable. At the end of the day, I believe most of your success stems from the network you have, the advocates that you create and relationships that you build and cultivate - I am grateful for the relationships I built with my professors who then became some of my greatest advocates as I entered the real world.”

My advice for future Jefferson students is to start thinking about not only “what” you want to study, what you want to do in life, but also “who” you want to work for. What’s most important to you in your future employer? Jefferson will challenge you to think about this early on as you attend career fairs and look for internships - many professors have industry experience that they bring to life in the classroom and have valuable perspectives on company culture and values to think about. It’s never too early to start thinking about this as your first job after college is an opportunity to jump start your career ...

Andrew G. Wallover CLU,CLTC

Managing Director
Northwestern Mutual

CLASS OF 2004
FINANCE MAJOR

“My major in Finance prepared me for a fulfilling career in Financial Planning. The personal interaction I received working alongside my professors helped me prepare for real life client meetings. The attention to detail and classroom assignments were relatable and transferrable, specifically, the Financial Management and International business courses. They helped to prepare me for the detailed nature of working in the personal and corporate finance markets. Lastly, being a student athlete, my professors understood the duality of my education. The ability to compete and study has given me a competitive advantage in the workforce.”

I advise anyone interested in pursuing a business degree at Jefferson to get to know your professors. They are all helpful in so many ways, whether you need help figuring out what you want to do after you graduate, or simply just help with a homework assignment.

ALUMNI PROFILE





Jefferson

Thomas Jefferson University