



# Financial Management Association

## A Small Investment with Phenomenal Returns

UNC FMA FALL 2022 NEWSLETTER



UNIVERSITY OF  
NORTHERN COLORADO

Monfort College of Business

### FMA Vision & Mission

#### VISION

*Established in 1970, the Financial Management Association International (FMA) is a global leader in developing and disseminating knowledge about financial decision making.*

#### MISSION

*FMA's mission is to broaden the common interests between academicians and practitioners, provide opportunities for professional interaction between and among academicians, practitioners and students, promote the development and understanding of basic and applied research and of sound financial practices, and to enhance the quality of education in finance.*



### MCB FMA Fall 2022 Highlights

- ♦ 6 Fall 2022 FMA Student Meetings
- ♦ 3 Robust Speakers
- ♦ FMA Team for MCB Case Competition—Won 2nd Place!
- ♦ Creation of “5 Minute Financial Focus” at beginning of meetings
- ♦ Formal Written Survey “Topics of Interest”
- ♦ Creation of Resume Bank
- ♦ Membership Growth averaging 12 to 31 members in Fall 2022
- ♦ Creation of Canvas Shell for Membership Communication & Information Sharing
- ♦ Visited 14 classes promoting membership
- ♦ Designed Executive Leadership Team
- ♦ Creation of MCB FMA Newsletter

# Informational Meeting

A Special Thank You to

**Rosa Law**

(Director of  
Advising and  
Student Success)

for making our  
Introductory  
meeting a great suc-  
cess !



## *Informational Meeting*

**Wednesday, September 28, 2022**

**5:00 – 6:30 pm | Room 0040 | Pizza and Dessert**

*Come learn how to enhance your career*

## Topics of Interest

- ♦ Careers in Finance
- ♦ Portfolio Management
- ♦ Crowd Funding
- ♦ FinTech
- ♦ Stock Analysis
- ♦ Money Management
- ♦ Success in Interviewing
- ♦ International Finance
- ♦ Banking & Venture Capital
- ♦ Non-Profit Startup
- ♦ Chartered Financial Analyst Licensure
- ♦ 2008 Financial Crises Case Studies
- ♦ Basic Investing Framework
- ♦ Application of Finance to other Careers
- ♦ A Day in the Life of a Finance Advisor
- ♦ Investing & Financial Literacy
- ♦ Importance of Office Culture
- ♦ Networking & Career Opportunities
- ♦ Upper level in finance (CFO)
- ♦ Government Finance



## Kellyn Dominguez (Speaker)

**Tuesday, October 11th**

**5:00 - 6:30 PM | Room 1050C**

**Dinner Provided**



### Professional Experience

Ms. Dominguez, Professional Experience Coordinator at UNC, provided the wisdom and tools to enable you to effectively network to land that Internship or First Post-Graduation Career Job and leverage a personal conversation into a career opportunity. The time also included an interactive session regarding professionalism and dialoguing with Ms. Dominguez.

- ♦ **Mock Interview Packet**
- ♦ **Professionalism Activity**
- ♦ **Resume Review Packet**
- ♦ **Interactive Presentation**



Center for Career Readiness



**Chad Moynahan (Speaker)**

**Commercial  
Real Estate**

**Thursday, October 27th  
5:00 - 6:30 PM | Room 1050C**

**Dinner Provided**



**JLL, a Commercial Real Estate Mergers and Acquisition & Management company, offers summer internships (that are open now) and recruits new hires upon graduation.**

**Chad shared his career journey that enabled his excellent success as well as explain the Commercial Real Estate market. As a UNC Alumni – he willingly connected with students and faculty as well as answered questions.**



#### **FMA Values and Beliefs**

- ♦ **Professional Integrity**
- ♦ **Respect, understanding, and appreciation of diverse needs and interests of others**
- ♦ **Free and open discourse and interaction among academia, practitioners, & students**
- ♦ **Open governance, broad-based participation, & continuous improvement**

## MCB Live Case Competition

Four of our members representing our UNC FMA chapter analyzed an emerging technology company and the ethical use of technology based technology. As such they:

1. Exhibited teamwork by participating as a “Consulting Firm” analyzing an ethical and practical solution,
2. Demonstrated strong ethical awareness and knowledge in the application of a solution to a real-world business scenario, and
3. Built critical thinking skills necessary for a long-term successful career.

**DANIELS FUND  
ETHICS INITIATIVE**  
Monfort College of Business  
University of Northern Colorado

# Congratulations!

## Case Competition Winners

**1<sup>st</sup> Place \$500**  
Annie Wright  
Tina Le  
Kaitlyn Lambo

**2<sup>nd</sup> Place \$250**  
Rebecca Kennedy  
AJ Robles  
Claudia Hernandez  
Mackenzie Kuehn

**3<sup>rd</sup> Place \$100**  
Will Oliveieri  
Beau Little  
Yahya Nur  
Joseph Reardon

*A special commendation goes to all who participated!*  
(Mary Siek will contact the winners)

## Entrepreneurship Week

Hosted an FMA Table for questions and insights in the Finance Arena

## 5 Minute Financial Focus

### “Educational Loan Debt Relief”

The debt relief applies only to loan balances you had before June 30, 2022. Any new loans disbursed on or after July 1, 2022, aren't eligible for debt relief. Other rules apply to consolidation loans.



## “Five Minute Financial Focus”



To enhance our members understanding of finance topics, we discussed during the first few minutes, a current topic such as “educational loan debt relief”. The Debt Relief discussed is the one in the Courts currently. It is a program that would have provided eligible borrowers a full or partial discharge of loans up to \$10,000 (or if Pell-Grant, up to \$20,000)

## Lestel Meade (Speaker)

## Residential Real Estate

**Tuesday, November 8th**

**5:00 - 6:30 PM | Room 1050C**

**Dinner Provided**



Ms. Meade is a Century 21 Real Estate agent and a Top Realtor in Northern Colorado. Her experience spans 23 years as she enables people to live out their home dreams, adds value to the home buying process, and offers the insight needed in today's tight home market.

She is the author of "Exposed: Success Secrets for Landlords" which guided students in building wealth through real estate investment!



*Ms. Meade presented real-world situations of clients who learned the following:*

- ♦ Rental Property as an Investment
- ♦ Multiply initial investment 4x
- ♦ Success as Income Property Investor
- ♦ Hedge against economic downturns
- ♦ Buying Rental Property using leverage
- ♦ Real Estate Skills netting \$12,000/yr.
- ♦ Wisdom in becoming a Landlord
- ♦ Extra income stream for security





## FMA Membership Dues

- ♦ *Regular member:* \$35 per 12 month period
- ♦ *National Honor Society member:*
  - ♦ \$40 (not \$35) per 12 month period
  - ♦ 3.5 GPA (Both Cumulative & Finance)
  - ♦ Jr or Sr w/ 6 hrs+ finance coursework

**www.FMA.org**

## FMA Student Benefits

- ♦ Sharpen Leadership Skills
- ♦ Career Guidance
- ♦ Networking
- ♦ Job Board and Resume Bank
- ♦ Membership with Amer Assoc of Individual Investors
- ♦ Industry Speakers (Investing, FINRA, Licensure, Not for Profit)
- ♦ Finance Leader's Conference March 2023
- ♦ Food and Friends

A special thanks  
to  
Sami & Kristi  
for ordering  
dinners!

### Department of Finance

**Joe French (Chair)**  
**Christine McClatchey**  
**Michael Martin (Assoc. Dean)**  
**Cris De La Torre**  
**Constantin Gurdgiev**  
**Deborah Lacey**  
**Johann Von Kampen**  
**Robert Herrera**  
**Kevin Ahern**  
**Bruce Kline**

## MCB FMA Executive Team

- ♦ **AJ RoblesRobles (President)**
- ♦ **Jacob Nederbragt (Vice President)**
- ♦ **Rebecca Kennedy (Treasurer)**
- ♦ **Sarah Rose (Secretary)**
- ♦ **Kaitlyn Lamgo (Director of Marketing)**
- ♦ **Joseph Reardon (Director of Website)**

**Deborah Lacey (FMA Faculty Advisor)**

# MCB Financial Education Center



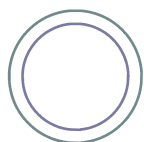
UNC's million-dollar Financial Education Center serves diverse needs for financial literacy within the Monfort College of Business and the university community. Students gain hands-on experience in the trading room and share knowledge with faculty and peers in the FEC's technology labs and social spaces. High-tech classrooms, conference space and student collaboration rooms are available to students, reflecting UNC's continued commitment to small-group, student-focused learning.



The college's finance emphasis has been accepted into the Chartered Financial Analyst (CFA) Institute's University Recognition program. Entry into the program signals to potential students, employers and the marketplace that the college's finance curriculum is closely tied to professional practice and is well-suited for preparing students to sit for CFA exams.



Monfort College of Business is the first and only business program to receive the Malcolm Baldrige National Quality Award from the Office of the President of the United States (2004).



## VISION & MISSION OF MONFORT COLLEGE OF BUSINESS

- ♦ **VISION:** The Monfort College of Business will serve as a leading provider of immersive business education and career preparation.
- ♦ **MISSION:** The Monfort College of Business prepares students for leadership and successful careers through immersive learning and a student-centered career development series.