MUTIS FINANCE SOCIETY

WOMEN IN FINANCE

MUTIS Women in Finance Conference

5th March 2020

In partnership with:

Welcome Message

WOMEN IN FINANCE

Dear attendees,

We are extremely delighted that you be joining us this afternoon in our inaugural Women in Finance Conference and we also wish to extend our deep appreciation for the immense support from the panelists and committee that helped us realise a long-standing vision of the society – encouraging diversity in the financial services industry.

We hope that after today's conference, you would be able to understand more about the issues and initiatives put in place surrounding gender equality and the unique role that you can play in promoting it.

It is important these issues can be discussed openly as it is the key first step to moving the ball forward to enact a real change, as there is a need to nurture diverse, open cultures in financial firms and beyond.

Thank you

– MUTIS Finance Society

About Us

WOMEN IN FINANCE

Since its conception in 2005, MUTIS Finance Society has since establish itself as one of the largest societies at the University of Manchester. Due to the society's focus on careers, MUTIS has been able to actively assist its members in securing highly competitive summer internships at pre-eminent financial institutions – an opportunity which has then led to many students being offered full-time graduate positions.

As a society which offers free membership, MUTIS hopes to encourage a diverse membership base by welcoming students from all academic disciplines regardless of their prior knowledge or experience. We seek to connect those who have not only a passion for the financial industry but also a strong commitment to aiding the understanding and broadening the knowledge of their fellow members.

Our core aims is to improve and advance our members' career prospects. We pursue this objective both on an internal basis, by leveraging the experience of our senior members and alumni, complemented by workshops run by industry leaders focusing on application advice, CVs and interview skills.

In addition to weekly meetings we have a busy calendar of keynote speakers who provide members with insightful views and opinions from within the financial industry and academia. Senior society members are also encouraged to aid the development of their peers through regular talks and presentations which outline the fundamentals of trading and investment.

Sign up today: http://www.mutis.co.uk/join-us/

Proudly sponsored by:

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Conference Agenda

16:30 – 16:50	**Opening Speech**
• *Opening Speech followed by short Q&A*	
16:50 – 17:30	**Panel Discussion on Career Progression**
• *Key topics will be the challenges that women face when trying to enter finance, career progression and firm initiatives that have been put in place to tackle these issues*	
17:30 – 18:15	**Networking incl. refreshments**
18:15 – 18:45	**Panel Discussion on Parenthood**
• *Discussion on pregnancy, parenting and the resulting challenges this poses regarding work-life balance and the promotion decisions; return-to-work programmes/other benefits*	
18:45 – 19:00	**Break**
19:00 – 19:45	**Leadership and Communication Workshop**
19:45 – 20:00	**Closing Speech**

COMPANY & PANELIST PROFILES

Clearwater International

Business Description

- Clearwater International is an independent corporate finance house focused on excellent client outcomes
- With 250+ employees in 16 international offices the business has completed over 1500+ transactions, worth more than €70 billion
- All projects were delivered by specialist industry teams, covering 10 sectors: automotive, business services, consumer, energy and utilities, financial services, food and beverage, healthcare, industrials and chemicals, real estate and TMT
- Working alongside directors, shareholders and investors we advise on all aspects of corporate finance from mergers and acquisitions (M&A) and company sales through to management buy-outs (MBOs) and fundraising transactions

Career Opportunities

- Clearwater International's Summer Internships and graduate programmes opens mid-August to mid-October

Conference Representative

Helen Lowe

Director

After qualifying as a Chartered Accountant with Baker Tilly in 2007, I spent a short time working in restructuring & recovery before embarking on my career in Corporate Finance with Begbies Traynor Corporate Finance in Manchester. Helen then relocated to Los Angeles to join Media M&A Boutique, ACF, advising independent TV production companies on exits to amongst other, ITV plc, before returning to the UK in 2013 to join Clearwater International's London team.

As a director at Clearwater, Helen is passionate about ensuring that clients receive the highest quality service, supporting entrepreneurs and management teams to achieve the right outcome, best suited to them and their business. During my time at Clearwater, Helen advised a number of inspirational clients, working across a variety of sectors from Consumer and Business Services to Industrials and Healthcare.

Source: Clearwater International

DC Advisory

Business Description

- DC Advisory is a leading corporate finance advisor with specific expertise in cross-border transactions
- As part of an established global business we offer access to over 500 professionals throughout the Americas, Asia and Europe
- DC Advisory provides tailored independent advice on M&A, capital raisings, refinancing and restructurings to a wide range of public and private clients, primarily in the mid-market
- The firm is renowned for their ability to execute complex transactions. Combining transactional expertise with a creative approach, the aim is to secure the best possible outcome for their clients

Career Opportunities

- Graduate recruitment programme commences in London c.third week in September
- The Manchester office recruits for a twelve-month internship around the same time, for commence July 2021

Conference Representative

Robert Jones

Executive Director

Robert joined DC's Manchester team in 2019 after over 15 years in Debt Advisory, Corporate Finance and Leveraged & Structured Finance at EY and AIB. He has advised on a number of high profile capital raising transactions for financial sponsors, corporates, family offices and entrepreneurs, across a wide range of sectors including: refinancing, restructuring, structured finance and M&A.

Recent businesses that Robert have advised include: The works, Bonhams, Go plant, AJW Aviation and Menzies distribution.

He joined DC because of the opportunity to work with like-minded people and build a business whose main focus is advising strong regional-based businesses. It is important to the DC's clients that they know the firm is connected locally

Source: DC Advisory

EY (1/2)

Business Description

- EY is a global leader in professional services through its four service lines: Assurance, Advisory, Tax and Transaction Advisory Services
- Employs c.280,000 employees in its global network of member firms working with c.200,000 customers in over 150 countries
- **Assurance:** Audit, Financial Accounting Advisory Services and Forensic & Integrity Services – provide insights and technical knowledge across geographies
- **Advisory:** Consulting (Business, Technology), Quantitative Advisory Services, People Advisory Services– combining industry knowledge and analytical thinking to help solve client's toughest business problems through creative solutions
- **Tax:** Tax, EMEAIA Tax Center, People Advisory Services (Mobility & Reward, Mobility) – combining exceptional knowledge and experience with technological platforms to offer services across all tax disciplines to companies, entrepreneurs and high-net worth individuals globally
- **Transaction Advisory Services:** Corporate Finance, Transactions Support, Restructuring, Operational Transaction Services, Capital Equipment, Economic Advisory, operational Research, Business Modelling & Analytics, and Valuation – advising organisations on growth strategies to stay competitive

Conference Representative

Jane Dowson
Student Attraction Advisor

Jane has worked at EY in Student Recruitment for three years, working to help students navigate the application process and make a successful transition from University into the firm. Jane also works to deliver female focussed events to encourage more females to feel confident and apply to jobs in the financial sector. Prior to working at EY, Jane worked in recruitment at two Universities and comes from a Marketing background.

Helen Bateman
Director, Risk Advisory

Helen is a Director within EY's Business Risk Services. Helen has over 20 years' experience of delivering internal audit and broader risk services within Big 4 organisation. Helen has a breadth of experience across both public and private sector clients. Helen has been a working parent since her return to work in October 2018. She works 4 days and week and is constantly juggling work life balance. Helen was delighted to be promoted to Director at EY in October 2019.

Source: EY

EY (2/2): Female-Focused Programmes

Discover EY – Women in Business

- For **first-year students** or those in **second-year of a four-year course**
- An interactive one-day Women in Business event in London will give you access to senior leading women within EY, and will have a focus on Assurance, Tax and Transactions. Anyone living outside of London will get travel and accommodation costs paid
- An opportunity to hear from our EY Women's Network about the support and opportunity for personal development as well as the formal and informal professional development we provide all our people, from trainee through to Partner
- **Applications to this programme are now open**:
    - ❑ **Women in Tax** – Monday 30 March 2020, **Women in Assurance** – Thursday, 2 April 2020, **Women in Transactions** – Friday 3 April 2020
- For more information please visit https://ukcareers.ey.com/students/programmes/undergraduate-programmes/discover-ey/women-in-business

Leading Women

- For **penultimate-year students** at University who have an interest or experience in leadership and want to get ahead in your career – EY's Leading Women programme could be right for you
- **One-week of paid work experience** within one of our service line teams (Assurance, Tax or Transactions) across the UK, starting **Monday** 15 June 2020
- Shadowing inspirational senior women within our business and supporting on real client work as well as hearing about what EY is doing to promote gender equality in the industry and within the firm and career opportunities available to you in EY. At the end of the placement, personalised career counselling will be provided to help you decide where you want to go and how we can help you get there
- **Applications to this programme are now open in the following locations**:
    - ❑ **Assurance:** Birmingham, Bristol, Edinburgh, Leeds, London and Manchester
    - ❑ **Tax:** Aberdeen, Bristol, Cambridge, Leeds, London, Luton, Manchester and Reading
    - ❑ **Transactions:** London
- For more information please visit https://ukcareers.ey.com/students/programmes/undergraduate-programmes/leading-women-programme

Source: EY

Future Finance

Business Description

- Founded in 2014, Future Finance is a Dublin-based student loan specialist founded by a group of ambitious entrepreneurs with experience building consumer finance companies globally
- UK's first dedicated private student loan specialist with the aim to ensure everyone has the freedom to focus on their studies, or kickstart their career – whatever their financial background might be.

Career Opportunities

- For more information please visit https://www.futurefinance.com/our-careers/

Conference Representative

Elizabeth Skinner

Chief Customer Officer

Elizabeth has over 20 years' experience in Financial Services and leads the marketing, brand and communications strategy at Future Finance. Core to this role is helping to educate students, partners and universities on the financial options available to ensure high potential students have the funding necessary to access higher education in the UK.

Prior to Future Finance, Elizabeth was an executive at American Express overseeing teams focused on product development, digital experience, strategic partnerships and all aspects of consumer marketing. She led their first global strategy to attract and educate Millennials, developing financial services that would meet their evolving needs and educating this audience on responsible borrowing.

Elizabeth is recognised within the industry and continues to focus on breakthrough communication programmes that support the next generation as they navigate the financial services' landscape. This is core to her role as Chief Customer Officer at Future Finance.

Source: Future Finance

Say it Karen

Conference Representative

Karen Hands

Speaker, Coach, Consultant

Karen's career began in a man's world of the chemical industry, as a graduate process engineer and project manager. After taking redundancy, Karen switched to working predominantly with women in settings such as retail, hospitality and the voluntary sector, when she also acquired entrepreneurial skills. Karen has been running my own training and coaching business since 1998 while building an active portfolio of quality improvement projects, organisational development, team leadership and board experience.

Intelligent, versatile and creative, Karen enjoys this way of working. Her qualifications include management and leadership, coaching and mentoring; but what's written on paper is probably less important than the personal qualities she can offer her clients:

- an empathy based on having 'been there too'
- the capacity to say what matters, to add value to what you're thinking, in a way that showcases what she teach about women making a greater contribution to decision-making
- a science-trained head sitting on customer service-skilled shoulders, which helps her to 'get' what you need quickly, to develop your skills at the right pace for you

Outside of work, Karen sits on the board of governors at Wakefield College and enjoys cycling and gardening.

"*Let me help you nurture female talent, whether you're the woman in question or the organisation in need of women's skills, experience and different perspectives on business. It's well-documented that diverse boards lead more successful companies and I can help to inspire change at every level to enable your transformation.*"

– Karen Hands

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Source: Say it Karen

Together Money

Business Description

- Headquarter in Cheadle, England, Together Money was established in 1974 and employs over 700 people today with a loan book of topping £3 billion
- The firm offers a range of mortgage and secured loan products such as residential and commercial mortgages, secured loans, bridging loans and auction finance to individuals and businesses that needs access to borrowing
- Together Money works with property developers, investors, and landlords and enjoy established relationships with mortgage brokers, auction houses, and those in the professional sector – including solicitors, accountants, and architects

Career Opportunities

- For more information please visit https://togethermoney.com/about-us/careers/

Conference Representative

Mel Fourie

Regional Development Director

Mel joins Together as the regional development director for the North West and brings with her over two decades worth of experience in the financial services industry. During her career within the industry she has worked in a number of roles, such as the strategic partnership manager for SME lending platform RateSetter, covering the north of England. She has also worked as Regional Partnership Manager in the corporate and commercial sectors for Funding Circle and spent more than thirteen years as a Regional business manager for Barclays, where she led the SME business banking team , delivering funding to clients across North West, Scotland and Northern Ireland.

On joining Together Mel said “I’m so lucky to already have such a huge network across the North West, with introducers, bankers and clients, which I have supported for many years. Together’s product offering, along with the group’s philosophy of common sense lending are something fresh in the market, that I can be really proud of and that I can share with all my contacts.“

Mel, who has a son and fosters children, has worked as an inspirational speaker and is a currently a trustee of Holly Grove School for children with special needs in Burnley. With her husband Tim, a former South African professional rugby player, she has raised tens of thousands of pounds for the school over the past nine years.

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Source: Together Money

UBS

Business Description

- Headquartered in Zurich, Switzerland, UBS has a geographical footprint across all major financial centers in 50 countries with a operational structure that comprises of a Corporate center and four business lines:
  - ❑ **Corporate Center:** Provides the Group's control functions such as finance, risk control and legal
  - ❑ **Global Wealth Management:** Provides comprehensive advice, solutions and services to wealthy families/individuals globally
  - ❑ **Personal & Corporate Banking:** Provides comprehensive financial products and services to UBS's private, corporate and institutional clients in Switzerland in a multi channel approach
  - ❑ **Asset Management:** Offers investment capabilities and styles across all major traditional and alternative asset classes to institutions, wholesale intermediaries and wealth management clients
  - ❑ **Investment Bank:** Provides corporate, institutional and wealth management clients expert advice, innovative solutions, execution and comprehensive access to international capital markets

Career Opportunities

- All applications for Spring Week, Internships and Graduate programmes open on September 1st
- Application closing dates:
  - ❑ Spring Week: 31 December
  - ❑ Internship: 31 December
  - ❑ Graduates: Mid-November

Conference Representative

Hannah Christo

Investment Banking Analyst

Graduated from the University of Manchester with a Masters in Mathematics with a focus on Pure Mathematics. Hannah joined the Graduate Programme at UBS in 2018 having did a summer internship in the TMT team in 2017. She is currently a senior analyst in the industrial technologies team, covering a range of clients across a full suite of financial products.

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Source: UBS

University of Manchester

Conference Representative

Patricia Perlman-Dee, CFA

Senior Lecturer in Finance

Patricia is a Senior Lecturer in Finance at Alliance Manchester Business School. She has as Masters in Finance and International Management from Stockholm School of Economics. She also holds a Post-Graduate Qualification in Teaching (PGCE) and is a fellow of the Higher Education Academy. Patricia is also a Chartered Financial Analyst (CFA) and a ABNLP qualified Master Coach and NLP Master Practitioner.

Patricia has extensive experience in the finance sector including derivatives and wealth management where she has worked for over 11 years in large financial corporations such as Citigroup, JP Morgan, Nomura and Barclays in Manchester, London and New York.

Patricia has worked with a wide range of financial markets products, including structured funds, structured products, OTC options, notes, swaps and warrants, and proprietary index derivatives.
Patricia has worked with a variety of client types including banks, asset managers, insurance companies, large corporates, fund distributors and other financial institutions. Geographically, Patricia has worked with clients from the Nordic countries, Belgium, Netherlands, Israel and UK.

Patricia has created, authored and teaches on a range of courses.

- Undergraduate; Financial Decision Making (1st Year), Applied Practical Investing (3rd year)
- Post Graduate, MBA; Practical Investing, Venture Capital & Private Equity, Not for Profit consultancy project, Commercial Business Project, International Business Project, M&A.
- Executive Education; A range of specialised investment courses for numerous Global Banks

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Source: University of Manchester