



Navigating Finance at Babson College

THROUGH THE STEPHEN D. CUTLER CENTER FOR INVESTMENTS AND FINANCE

Created by Joyce Wang '23
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**Intro into Finance:
Timeline to Getting
Started**

Introduction

If you are a first-year or a sophomore, this section will be especially helpful. In this section, there will be beginner steps to take to advance your finance learning curve. They are prerequisites for some of the other items discussed in later sections, such as programs and advanced tools.

02

**Resources:
Tutorials to
Enhance Learning**

Resources

In this section, I have linked to several other tutorials available through the Cutler Center. As you discover these resources and learn different functions, these tutorials will come in handy for answering any questions you may have.

03

**Career Tips: How
to Approach
Applications and
Interviews**

Career

In addition to learning, one of our ultimate goals is to help you secure the career of your choice. In this section, there will be advice, resources, and other information that can help guide you in the application and interview process of your career search.

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Appendix

Appendix

This section will include details on all the resources, events, organizations, and programs mentioned. They are linked to their respective web pages.



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Intro into Finance

So you want to explore finance at Babson College... where do you start? Here are a couple of suggestions that will set you off on the right foot.

First Year Starter Tips:

1. **Coursework:** Take Intro to Financial Accounting in the first semester and the Principles of Finance course during your second semester. By doing this, you will be able to kick-start your finance journey and take more advanced-level finance courses at an earlier time in your college career.
 - a. **Office Hours:** Get to know your professors! Aside from teaching courses at Babson, our professors are all very experienced in the industry and can offer valuable advice, feedback, and perspectives. While the following are not restricted to class year, it is highly suggested that you learn about them and get involved as soon as possible:
2. **Engagement:** Get involved in Clubs and Organizations. The Babson Finance Association is an academic organization that covers all things finance, including investment banking, asset management, private equity, and sales and trading. In addition to these sectors, BFA offers programs such as Women in Finance, the Babson Analyst Initiative, and the Financial Wellness Program. Scholars of Finance is another academic organization that aims to teach finance students leadership skills to steward the world's capital for the greater good. They host speaker events with leaders from the top financial institutions.
 - **Navigating these events:** To get the most out of every event, it is suggested that you stay engaged and ask questions, obtain the contact information of featured guests and connect with them individually after the event, and leverage these events to meet others at the companies and expand your network.
 - **Cutler Center Programs & Events:** The Cutler Center hosts and sponsors a variety of events and programs every academic year. Some include: Finance lab open houses, Finance lab 101 series, the Babson Trading Competition, and more. Details can be found through the Cutler Center's website and Instagram.
 - Events can be viewed [here](#).
3. **Assistance:** Leverage your peers for assistance in finance-related work or extracurricular activities. At the Cutler Center, there is always a Cutler Center Student Assistant on staff. These student assistants are very experienced in finance at Babson and will be able to provide guidance and helpful insight on the next steps! You can find the current student assistants [here](#).
4. **Self-Learning Courses:** As a first-year student, there are not many finance-specific courses that you can take, other than Principles of Finance. To speed up your learning curve and get ahead for the future, it is recommended that you learn on your own time. There are multiple ways to learn, and these are some examples:
 - **Wall Street Journal:** It is good to get into the habit of reading the news every day if you are not already. Babson students get free subscriptions to the Wall Street Journal - take advantage of it!

For additional details not included in this document, visit the [Stephen D. Cutler Center for Investments and Finance website here](#).



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- Bloomberg Market Concepts (BMC): This is a good first-step course to get you started. You can ask the Cutler Center assistants on shift to help you create an account and start working through the courses. Students can work through BMC on the Bloomberg terminals in the Cutler Center or on their own laptops through the [Bloomberg for Education website](#).
 - Wall Street Prep: After you complete Bloomberg Market Concepts, you can submit a request for a Wall Street Prep Student Passport license. This online course offers lessons on a variety of different topics, ranging from analyzing financial reports to building financial models. There is a limited number of licenses per academic year. More details on how to request a license can be found here: [Wall Street Prep License - Request Process](#)
5. Programs/Courses: If you are looking to further your education and career path, Babson offers additional programs, some of which are offered through the Cutler Center. Participants typically have to apply and be accepted to these. Some of the great options include:
- Value Investing Seminar: This two-semester seminar is for select undergraduate and graduate students interested in value investing. Hedge fund manager Gary Mishuris, CFA, will draw on a range of readings, including Benjamin Graham's Security Analysis and Warren Buffett's partnership letters, to discuss the investing philosophies and processes of successful value investors.
 - SPEAR IB: This semester-long program was designed by a fellow Babson student in conjunction with CCD and leveraging the resources of the Cutler Center to provide critical knowledge, applicable skills, and key resources for aspiring investment banking professionals. The program runs every semester and consists of 13 sessions, each designed to improve your chances of receiving an internship offer in investment banking. Highlights include learning research and analysis, financial modeling, pitching, behavior, and technical interview prep, and more. This program is designed for first-year students in their second semester and all second-year students.
 - Babson Analyst Initiative: This is a two-semester program for first- and second-year students. The program covers all topics related to equity research, culminating in a stock pitch competition at the end of each semester.
 - Babson College Fund (BCF): The BCF is an accredited course in which specially selected students from both the undergraduate and graduate schools are assigned to manage \$8 million of the Babson College endowment. The program is for highly self-motivated individuals with a strong interest in finance and investments. Participation requires a two-semester commitment. More information on BCF, the recruitment process, and specific eligibility requirements can be found on the [BCF website](#).
6. Mentorship: The Cutler Center Mentor Program is a great way to expand your network and learn from industry professionals. Undergraduate and graduate students are matched with industry professionals from across the finance industry. The goal is to enhance students' personal networks, develop their career paths, and provide assistance, guidance, and feedback.
- This program is available every year. It is encouraged that you apply starting your first year at Babson to maximize your experience! The [application](#) deadline is typically in mid- September, with mentor/mentee matches communicated by early October.

For additional details not included in this document, visit the [Stephen D. Cutler Center for Investments and Finance website](#) [here](#).



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Cutler Center Resources



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At the Cutler Center, students are able to access 42 workstations equipped with Bloomberg, FactSet, Capital IQ and other tools used by industry professionals. This section includes tutorials made by Cutler Center Student Assistants on how to navigate these resources. Below please find a listing of select tutorials to help you begin to explore and learn the functionality of various Cutler Center tools.

For more tutorials available, visit the [Guides](#) page on the Cutler Center website.

Bloomberg:

[Introduction to Bloomberg Terminal](#)

[Equity Valuation Using Bloomberg](#)

[Functions to Get Started: DES, FA, EQRV, CF, ANR, BRC, CN, DSCO, TOP, and BI. DCF Inputs](#)

[Screening: ESQ Function](#)

FactSet:

[Building Graphs](#)

[An Investor's Guide to FactSet](#)

[Introduction to Screening in FactSet](#)

[Building an Equity Screen](#)

[Equity Screening \(2 Factor Model\)](#)

Excel:

[Keyboard Shortcuts and Basic Knowledge](#)

Capital IQ:

[Basic Functionality and Navigation](#)

Morningstar:

[Easy Screening for Beginners](#)

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Career Advancements

In addition to learning how to navigate Cutler Center resources, coursework, and extracurricular activities, it is also important to think ahead about career exploration and advancement. This section will include tips and advice on approaching applications and interviews.

Applications:

It is always good to get a head start when applying to roles. Depending on the industry, the timeline may be different. I would suggest looking up when general applications open and keeping track of them in a spreadsheet with the following categories:

Company	Position	App Open Date	Date Applied	Round 1	Round 2	Superday	Final Decision	Networking Contact(s)
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Having them listed before applications open will serve as a checklist.

Additionally, scheduling an appointment with the Center for Career Development (CCD) would be helpful for understanding the basics as you approach application season. Within CCD, the Handshake platform also posts job listings, which is a great place to check for roles you are interested in.

Interviews:

In most finance interviews, you will have a mix of both technical and behavioral questions.

Approaching Technical Questions:

Attached below is a very detailed PDF containing 400 technical questions. While this specific document is tailored to investment banking, it can be used for all industries.

Note: Outside investment banking interviews, most of the technical content focuses on basic accounting questions. If you are not applying for an IB role, you do not need to go through the entire document. If you are applying to IB, it is highly recommended that you review all the content in the PDF so you can comprehend and apply the concepts to scenario-based questions (sometimes with numbers).



← [400 IB Interview Questions](#)

For additional details not included in this document, visit the Stephen D. Cutler Center for Investments and Finance website [here](#).



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General Tips Approaching Technical Questions:

A lot of preparation is required to understand the technical questions; however, some may be beyond your knowledge. Although this can be a stressful situation to be in during an interview, it is not going to ruin your shot at getting the role. If you do not know the answer, do not guess. Here are a few suggestions to approach this situation:

- Acknowledge that you are not sure or have not learned the material yet.
- From here, you may walk them through your thought process to the best of your knowledge.
- If you have no idea how to approach the question, it is best to admit that and ask them to walk you through it. By asking, you are showing initiative and a desire to learn, both of which are positive qualities.

Approaching Behavioral Questions:

When asked a behavioral question, no matter what the question is, you should always incorporate a story/example. Leverage your experiences to create your own competitive advantage. Here are a few pointers:

- Explain your experience, focusing on the most relevant parts that relate to the question.
- What did you take away? What did you learn?
- Highlight the qualities that this experience has helped develop and further enhance your character.
- Moving forward, why was this relevant? How can you improve further?
- Follow through by commenting on how the experience will benefit you in that particular role that you are interviewing for.

This is not the only way to approach behavioral questions, but it is a good starting point to help you think about how to tailor your response to the question and incorporate your experiences and story. In the end, you want to make sure that you are telling your truth and expressing it in a way that represents you as a person. This will give your interviewer a window into who you are and help build rapport.

Networking:

Networking involves using personal, professional, academic, or familial contacts to assist with a job search, achieve career goals, learn more about your field, or another field you'd like to work in. This is a very important part of your application, interview, and overall career search process.

Networking Tips:

Start Early. Networking can be done well in advance of applying and interviewing. Reaching out to people connected to your area of interest can be beneficial when it's time to apply. Babson alumni are very open to conversations about networking. Keep a spreadsheet of people you talk to and track your progress over time. It is also important to keep in touch with these contacts after the initial call to maintain the relationship. An example format for your Excel sheet could look like this:

Date	Name	Company	Role	Notes	Recommended Contacts
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For additional details not included in this document, visit the [Stephen D. Cutler Center for Investments and Finance website here](#).



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Suggestions for Finding Contacts:

- LinkedIn: Going to the “search” section and typing in (company or role name) and “Babson” will identify a list of Babson alumni who are involved in the company or position of interest. From here, you can send a connection request with a note or email them using their company email.
- Cutler Center Mentor Program: As previously mentioned, this program is a great way to build your network. Your mentor will be a great resource, and they can also introduce you to their contacts!
- Cutler Center Student Assistants: All of the student assistants at the Cutler Center are familiar with the process of networking. Many of them are interning or working at reputable firms, and can be great connections as well. Talking to these students may be beneficial for expanding your network and learning more about the process from a student perspective!

For additional details not included in this document, visit the Stephen D. Cutler Center for Investments and Finance website [here](#).



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Appendix

This section includes additional details on certain items mentioned throughout the document.

Babson Finance Association

LinkedIn: <https://www.linkedin.com/company/babsonfinassoc/> Instagram: [@babsonfinanceassociation](https://www.instagram.com/babsonfinanceassociation)

Membership Form: <https://forms.office.com/r/aN2PEXViuz>



The Babson Finance Association (BFA) is the largest organization on campus. Each event is open to all members, and there is an opportunity at the beginning of each academic year to join the leadership team, including Freshman Representatives! BFA aims to provide professional, educational, and career development opportunities to produce graduates with the skills, knowledge, and connections to thrive in finance. The Babson Finance Association covers the following sectors:

- Investment Banking
- Asset Management
- Sales & Trading
- Private Equity

Each sector will host a few events per semester, including guest speaker events from reputable firms, workshops, and more. Some of the companies that have been brought to campus in the past include: J.P. Morgan, Goldman Sachs, Harris Williams, MSD Partners, Deutsche Bank, Citi, Bank of America, and more.

BFA also offers the following experiential learning programs:

- Babson Analyst Initiative
- Financial Wellness Program
- Women in Finance

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LinkedIn: <https://www.linkedin.com/company/scholars-of-finance/>

Website: <https://scholarsoffinance.org/>

Instagram: [@sof.babson](https://www.instagram.com/sof.babson)

Contact: babson@scholarsoffinance.org

Who We Are

The finance industry often carries certain stereotypes that can undermine the integrity and potential of finance majors. It is often associated with greed, cutthroat competition, and a focus solely on making money; think of Jordan Belfort from *The Wolf of Wall Street*. Scholars of Finance recognize this stereotype and actively work to defeat these assumptions and build a new narrative within the industry.

Our Mission

We are on a mission to transform finance. We seek to solve the world's largest problems by investing in undergraduate students through leadership development, mentorship, and the active support of hundreds of purpose-driven finance executives and investors. Our members then join top firms, funds, and a lifelong support community that empowers them to spend their careers serving the greater good using the world's biggest lever: finance. We believe that helping future finance leaders build character can change the whole world for the better.

Our Values

Since our primary focus is to espouse ethics, integrity, and stewardship among the finance leaders of tomorrow, we orient conversations toward how to uphold these values at home, at work, and in investment decisions. While these discussions are held within the context of our organization, we believe the truths we uncover apply universally to all aspects of a leader's life. Our values include: [integrity](#), [compassion](#), [humility](#), [curiosity](#), [impact](#), and [courage](#).

Our Program

- Upon acceptance into the organization, everyone starts as a “candidate.” Once the candidates complete the Leadership Development Program (LDP), their status is upgraded to “member.”
- The LDP is a seven-week course built for self-discovery that helps students learn and live by their values. After graduating from the LDP, members have access to the mentorship program that creates 1:1 relationships between students and astute finance professionals in our network.
- Members have access to technical training, provided in partnership with Training The Street.
- In addition to the speaker series, members are welcome to join symposiums all over the country.
- Babson SOF also hosts chapter dinners and fun social events like golf outings, mixers with local chapters (Harvard, Boston College, MIT), dinners, and even skydiving!

How to Apply

Visit SOF social media above or subscribe to the BFA weekly newsletter for more information. Recruitment occurs on a semester basis. Fall recruitment begins in early October, and Spring recruitment begins in early February.

For additional details not included in this document, visit the Stephen D. Cutler Center for Investments and Finance website [here](#).



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Babson Analyst Initiative

The Babson Analyst Initiative is BFA's equity research and stock pitch exploratory program. It is open to First-years and Sophomores at all experience levels and is designed to introduce students to equity research and portfolio management. The Babson Analyst Initiative is a highly selective program to which students must apply. However, the program is not exclusive, and many of the materials distributed to members for educational purposes will be shared on the BFA Canvas page for anyone who is interested in learning more about the art of stock pitching.

Highlights of the Program:

- The program spans across one entire academic year.
- Teams of students will work together to research a company, create a pitch deck, and present it in a competition with industry professionals.
- The cohort will attend weekly sessions featuring guests and learning the necessary skills to complete their pitches.

Financial Wellness Program

The Financial Wellness Program is BFA's community service program, and its mission is to provide tried-and-tested financial literacy workshops to individuals and families in socioeconomically disadvantaged communities in the Greater Boston area.

The Financial Wellness Program is designed to teach financial literacy on topics such as:

- Credit Management
- Different Bank Products
- Investment Tools
- Money Management Post-College
- Financial Planning for College
- Student Loans
- Earnings and Paycheck Breakdowns

Teaching Settings:

BOW Community: The partnership of Babson, Olin, and Wellesley Colleges with the goal of expanding educational opportunities for all three communities. Given that each college has a different niche, we plan to host BOW workshops to fill the gaps.

Boys and Girls Club: Each semester, the FWP collaborates with the B&GC of Boston to teach financial literacy and entrepreneurship to high school students.

For Mentors:

Students accepted into this program will participate in a training program led by Professor Kathy Hevert of the Babson Financial Literacy Project to become Financial Wellness Trainers. These trainers will then teach financial literacy workshops at other schools and institutions to serve underprivileged communities. This program is open to First-years, Sophomores, and Juniors.

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Program Overview

The SPEAR IB program was designed by fellow Babson alumnus Tyson Corner '22 in Spring 2021. In partnership with the Undergraduate Center for Career Development and the Cutler Center, SPEAR provides aspiring investment banking professionals with the critical knowledge, applicable skills, and key resources to succeed in the industry. The program consists of 13 sessions, each specifically designed to improve participants' likelihood of receiving an internship offer in investment banking (one of the most lucrative careers out of college, with a ~1% acceptance rate). SPEAR IB is a journey, and those bold enough to take it on are forever changed.

Participant Highlights

- Guiding principles and values of SPEAR
- Behavioral and technical interview prep
- Networking tips and tricks
- Equity research and analysis
- Financial modeling experience
- Creating and presenting a pitch
- Group of peers to support your journey
- Qualified facilitators familiar with the process

Internship Placement

Bulge Bracket (8)	Elite Boutique(3)	Middle Market (20)	Regional Boutique (8)

Application Information

The SPEAR IB program runs every semester. 14 students are admitted every semester. Fall cohorts are open to sophomores only and Spring cohorts are open to first years and sophomores.

LinkedIn: <https://www.linkedin.com/company/spear-ib/>

For additional details not included in this document, visit the Stephen D. Cutler Center for Investments and Finance website [here](#).



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Babson College Fund



Patrick Gregory, CFA

Patrick Gregory, CFA is the Managing Director of the Stephen D. Cutler Center for Investments and Finance, the Director of the Babson College Fund, and a Senior Lecturer in the Finance Division at Babson College. Before joining the faculty, Patrick was an institutional portfolio manager at FM Global from 2007 to 2015, where he managed the Healthcare, Internet, and Telecom sectors of a \$6 billion equity portfolio. He was also responsible for the evaluation, selection, and ongoing evaluation of third-party investment managers.

About the Program:

The Babson College Fund (BCF) is an accredited course in which specially selected students from both the undergraduate and graduate schools to manage a portion of the Babson College endowment. The program is for highly self-motivated individuals with a strong interest in finance and investments. Participation requires a two-semester commitment.

The program seeks to provide a rich educational experience by developing investment research skills and gaining portfolio management experience. These skills and experience are highly valued by employers in the investment industry.

Program Objectives:

The investment objective of the Babson College Fund is to outperform the S&P 500 Index. Managers conduct extensive fundamental and quantitative research to identify stocks that are attractively priced at their current market value. Selected stocks are then combined in a diversified portfolio. The managers monitor the fund's performance and sources of risk, aiming to keep risk and tracking error within allowable bounds. Managers budget the allowable risk to the active positions expected to add the most value.

The sector teams are responsible for one or more of the Global Industry Classification System (GICS) sectors. The sectors are grouped as follows:

- Consumer Staples
- Consumer Discretionary
- Financials
- Healthcare
- Energy
- Information Technology
- Communication Services
- Industrials

Student Testimonial:

“Not only did BCF provide me with a vast array of resources that helped shape my investment and valuation process, it gave me a community of like-minded people that I stay in touch with on a regular basis. Post my time as a student, I got the opportunity to contribute as well as learn from this community as a mentor which has been an extremely fulfilling experience.”
-Paurav Barot MSF '20

The current student managers and faculty advisors can be found [here](#).

For additional details not included in this document, visit the Stephen D. Cutler Center for Investments and Finance website [here](#).



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Value Investing Seminar



About Gary Mishuris, CFA:

Prior to founding Silver Ring Value Partners, Gary successfully managed the U.S. Focused Value strategy using a concentrated intrinsic value process at Manulife Asset Management from 2012-2016 as Lead Portfolio Manager. He also was Vice President, Senior Equity Analyst/Portfolio Manager for Evergreen Investments from 2001-2010. He started his career at Fidelity Investments as a Research Associate between 2001-2004.

In this two-semester seminar series, Gary Mishuris, CFA, will use a number of readings from Ben Graham, Warren Buffett, and other authors to discuss the investing philosophies and processes of successful value investors. With Gary's help, you'll be able to use the insights from the readings to build your own value investing framework that is internally consistent and suited to your strengths.

All students must apply for the seminar via the online application and complete the reading assignment detailed in the application to be considered. Space is limited. If selected, students are expected to complete weekly readings and assignments before each seminar meeting to be prepared to actively contribute to the weekly seminar discussions.

The application deadline is typically mid-September.

Required Reading to apply: Benjamin Graham's *The Intelligent Investor*

Student Testimonial:

"Gary is an incredible teacher and an even better investor. You will learn from a wide variety of legendary investors, and with Gary's help, you will begin to customize aspects of their philosophies to better suit your own strengths and weaknesses. I highly recommend anyone interested in investing to apply! If you put in the time, I guarantee that this seminar will have an immensely positive impact on the way you approach investing."

- Peter D'Ambrosio '24

For additional details not included in this document, visit the Stephen D. Cutler Center for Investments and Finance [website here](#).



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Cutler Center Mentor Program



The Cutler Center mentor program matches undergraduate and graduate students with industry professionals from across the finance industry. Mentors are paired with a student majoring in finance to enhance the student's personal network, help develop their career path, and provide advice, guidance, and feedback.

Program Details:

The Cutler Center mentor program runs from October to May, and mentors commit to a minimum of six hours with their mentee over these eight months. To participate, potential mentors and mentees must each complete their respective application forms to help with the matching process.

Once mentors and mentees have been matched, each pair will work together to schedule meetings throughout the program. Participants decide on the communication method(s) best suited for them (email, phone, in-person meetings, Webex, etc.). To set the expectations for the relationship, the Cutler Center will provide materials to engage mentors and mentees. Participants may also choose to attend various events and programs hosted by the Cutler Center.

Benefit to Students: With access to industry professionals, finance students gain an invaluable perspective and inspiration from like-minded individuals who have found success across a wide array of settings and industries. As a mentee, you will:

- Learn the benefits and purpose of mentorship and the value it extends beyond job placement.
- Gain confidence in your career strategy
- Refine networking and communication skills
- Further develop networks of support that will extend throughout your lifetime

Student Testimonial:

“I have been fortunate enough to participate in the mentorship program since my first year at Babson. The meaningful connections I have made with my mentors have guided me both academically and professionally, allowing me to make the most out of my Babson experience!”

- Alex Bowers '24

Applications can be found using this [link](#).

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FIN4504: Private Equity



This undergraduate course will provide students with the opportunity to develop a practical understanding of the private equity industry and related topics, particularly venture capital. The course will focus on various phases of activity, including fund organization, prospecting, valuation, LBO modeling, negotiating skills, and exits. The course will also provide students with an understanding of careers in private equity and related industries. It is designed to enable students to apply financial theory in practice, consistent with industry practices, techniques, and professional expectations. The class will use case studies involving real companies and will place heavy emphasis on practical financial research skills relevant to private equity and on how industry-specific issues are addressed by private equity professionals.

In partnership with the Cutler Center, this course integrates the involvement of several Private Equity practitioners ('Executives in Residence') to enrich the educational experience and to discuss industry experiences firsthand. Students have the opportunity to learn, interact, and develop relationships with these Private Equity Executives in Residence throughout the semester.

Student Testimonial:

"I was excited to learn from alumni professionals who actually implement the lessons they teach. This has been an incredibly rewarding experience, educating me on the complex world of private equity while also connecting me with some of the best operators in the business."

- Gabriel Papa '23

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FIN3502: Fintech



The financial services industry is changing rapidly with the emergence of financial technology (FinTech). This course introduces key financial technologies and their applications in financial services. Students will develop a broad and solid understanding of the recent innovations in FinTech, and their benefits and limitations. Ultimately, this course aims to help students identify entrepreneurial opportunities in FinTech and equip them with relevant knowledge and skills. The course will use a mixture of lectures, hands-on programming, case studies, guest speakers, and group projects. This course emphasizes and builds on Entrepreneurial Thought & Action, and Diversity, Equity, and Inclusion in the context of the financial services industry.

In this course, students will also have hands-on problem-solving experiences that will be useful in the FinTech venture. The class participates in a group project where students must develop their own fintech ideas to pitch in class. Selected groups will then be invited to pitch at the Babson FinTech Startup Pitch Competition at the end of the semester, hosted by the Cutler Center.

[2025 Fintech Pitch Competition Recap](#)

[2024 Fintech Pitch Competition Recap](#)

[2023 Fintech Pitch Competition Recap](#)

[2022 Fintech Pitch Competition Recap](#)

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