



Bentley University Wall Street 101 Summer Camps (Program Details and Frequently Asked Questions) (January 22, 2020)

IMPORTANT DATES:

<u>Dates</u>	<u>Session Topic</u>
June 28 to July 3, 2020	Macroeconomics and Financial Markets
July 5 to July 10, 2020	Equity Research
July 12 to July 17, 2020	International Financial Management
July 19 to July 24, 2020	Portfolio Management
July 26 to July 31, 2020	Careers on Wall Street

DESCRIPTION OF EACH SESSION

Macroeconomics and Financial Markets: This is an overview course on the link between the economy and the financial markets, in particular, how government policies and macroeconomic performances impact securities trading. As important policy decisions are announced or forecast, traders, portfolio managers, and hedge funds, for example, make changes in their trading and investment decisions involving stocks, bonds, currencies, ETFs, commodities, and derivatives. The session uses data analysis, simulation exercises, and interactive trading cases to increase one's understanding of the intricate link between the economy and the financial markets. There will be site visits and the opportunity to interact with analysts, policy makers, and financial executives.

Equity Research: Experience first-hand what you need to learn to be a financial analyst at a Wall Street firm. Learn about financial statement analysis, forecasting, risk analysis, and analyst recommendations performed at a buy side or sell side desk. You will learn how to prepare industry standard reports, present your stock-pitch to sales & trading clients or portfolio managers, and interact with financial executives. The session uses data analysis, simulation exercises, and interactive trading cases to increase one's understanding of equity research. There will be site visits and the opportunity to interact with analysts, portfolio managers, and financial executives.

International Financial Management: Imagine yourself working for a global asset management firm that trades foreign currencies. As a junior currency trader, first, you will need to understand the currency market to learn how currencies are quoted, traded, and valued. Next, you will be exposed to major global policy events such as trade wars, political risk, central bank interventions, and financial crisis that affect the currency market. You will then have the opportunity to learn about foreign exchange risks of firms operating in the global market and how to manage their exposure using currency derivatives. We will introduce you to machine learning in the currency markets to forecast exchange rates and trade currencies. Finally, through investing in exchange traded funds (ETFs), you will construct global investment portfolios to examine the effects of currency risk on international investment. The session uses data analysis, simulation exercises, and interactive trading cases to increase one's understanding of currency trading and risk management. There will be site visits and the opportunity to interact with analysts, currency traders, and financial executives.

Portfolio Management: You are working as a member of a portfolio management team. This session introduces you to data analytics you will need to learn how to construct a portfolio of stocks, bonds, and currencies. You will learn fundamental indicators or risk and return of the portfolio you will construct in a team. You will use industry standard software including Bloomberg, FactSet, Capital IQ, and Morningstar to complete financial analysis for portfolio

management, back testing, and contribution analysis. The session uses data analysis, simulation exercises, and interactive trading cases to increase one's understanding of portfolio management. There will be site visits and the opportunity to interact with analysts, portfolio managers and risk managers.

Careers on Wall Street: For each day in this session, you will learn about various career opportunities after you graduate from college. To be successful in gaining an entry level professional job, you will need to plan ahead. You will learn what a financial professional does as a portfolio manager, as an analyst, as an investment banker, as a trader, as a risk manager, as a chief economist, and as a chief financial officer, for example. These professions require investment in education, internships, networking, and developing insights on financial markets. The session uses data analysis, simulation exercises, role playing, cases study, and mock interviews to increase one's understanding of various professions on Wall Street. There will be site visits and the opportunity to interact with analysts, policy makers, portfolio managers, and financial executives.

Typical agenda for a session (all classes are held in the Trading Room)

Registration	Sunday 3:00 to 5:00 p.m. Dinner at 5:15 p.m. Parents are invited. Location: Trading Room (Smith Technology Center 226). Dinner: Executive Dining Room, La Cava Bldg.
Lectures	Monday - Friday 8:30am to 5:00 p.m. (on campus and some site visits)
Presentations/Awards	Friday, 5:00 p.m. to 7:00 p.m. Dinner at 7:00 p.m. Parents are invited.

TUITION

Program tuition

Tuition for each program is \$1,500. All program materials, meals, snack breaks, Boston field trips, executive speakers, trading competitions, and prizes are included in the program tuition.

Cancellation policy

Payment is due in full by May 10, 2020.

- 100% refund if you let us know by May 13
- 25% refund if you let us know by May 17
- 0% refund after May 17
- (\$75 application fee is non-refundable regardless of cancellation date or cancellation of a session)

CANCELLATION OF PROGRAM

Bentley University deserves the right to cancel any session due to unforeseen events and institutional reasons. We will refund the full tuition if a session is cancelled. Application fee is nonrefundable.

APPLICATION DEADLINES

Application Period:	Application is open from January 20, 2020 to April 25, 2020.
Decisions Announced:	May 1, 2020. By email.
Payment Due in Full:	May 10, 2020

To apply, click on the link below

<https://commerce.cashnet.com/BENTLEYWALLST101>

FREQUENTLY ASKED QUESTIONS (FAQ)

How many students are in the class?

There are 45 students in each class.

What academic achievements are you looking for?

We are seeking well rounded individuals who have a passion for finance and/or a keen interest in learning more about the world of global finance and investing. Leadership skills, community involvement, sports activities, volunteer work, notable achievements, hobbies, and strong grades are all very important components of your application.

Do demonstrations of leadership qualities enhance ones chance for admission?

Yes, we are seeking well rounded individuals who are interested in global finance, investing and leadership.

Can I apply to the program if I am not a rising high school junior or senior?

The program is geared towards rising high school juniors and seniors. Registration is competitive. We have made exceptions in the past for rising high school sophomores who exhibit exceptional drive and interest in the global financial markets. Feel free to register as a rising high school sophomore but note that priority is granted to rising juniors and seniors.

Does registration require a teacher recommendation?

Recommendation letters are optional but it is always helpful to 'get the ball rolling' for your college application process by requesting a recommendation letter from a favorite teacher or guidance counselor. A recommendation letter will also assist us in getting to know more about you as an applicant. We also welcome recommendation letters from anyone (not related to you) other than your teacher or guidance counsellor.

Does registration require an official transcript or can I send you a copy?

A copy of your transcript is perfectly acceptable.

Does registration require an official SAT/ACT score report or can I send a copy?

A copy of your SAT/ACT score report is perfectly acceptable.

What if I haven't received my SAT/ACT scores yet?

Please submit a message to tradingroom@bentley.edu in a separate email once you receive one.

How competitive is the program?

The program is extremely competitive, and we are oversubscribed every year. Please apply early and take time to demonstrate your interest and curiosity about the world of global finance.

Is a certain weighted/unweighted GPA required?

No. A student is much more than a GPA. We are more interested in the student's ability to work hard, help others, express ideas, ask questions, participate in his/her community, etc.

What should I talk about in my essay?

We are looking for students to express their passion and interest in finance, or their curiosity about the world of global finance and investing. We are far more interested in students' drive to learn vs. their respective GPAs. Any activities, volunteer efforts, sports affiliations, hobbies, are all helpful to include so we can get to know you.

Should my application include a resume?

It is not required but helpful. If you are submitting your resume, try to limit the length to one page.

May I apply if I am homeschooled?

Yes, we welcome applications from students who are being schooled at home.

Can I apply to the program if I will be graduating from high school in June 2020?

The program is geared towards rising high school juniors and seniors. Registration is competitive. We have made exceptions in the past for students who have recently graduated from high school and who exhibit exceptional drive and interest in the global financial markets. Feel free to register as a graduating (June 2020) high school student but please note that priority is granted to the rising high school juniors and seniors.

Camp Policy

The nonresidential programs have a set of rules governing student conduct at all times to make this program safe, fun, and educational for all campers. Make sure you abide by these rules at all times. There will be camp assistants assigned to help you navigate through each camp for your comfort and safety. Disciplinary actions will be taken against anyone violating camp policies.

Do I need to bring my laptop?

No. The Trading Room has computers.

What is the dress code?

Monday-Thursday: Dress code is business casual (khakis/golf shirts for men, casual, conservative pants/skirt and shirts for women). Business casual dress code does not include shorts, t-shirts, and sneakers. **Friday:** Dress code is business formal (suit and tie for men, pant suit or skirt suit for women) when we are visiting Boston area investment firms and when students are making their presentations/stock pitches.

Lost and stolen items

Bentley University is not responsible for lost or stolen items.

Cell phone policy

We understand that cell phones are important part of your life for communicating with your friends and family. However, we will enforce the following rules regarding the usage of your phone during academic sessions and field trips: Keep phones on silent mode; Texting and playing games is strictly prohibited; Talking on the phones is not allowed unless in an emergency.

Dietary restrictions/food allergies/medical insurance

Please let us know in advance of any dietary restrictions you may have and we will be able to accommodate your needs. You are also welcome to bring your own food if that is more comfortable for you. Proof of your medical insurance coverage is required.

Where do the students come from?

Students come from the United States and many foreign countries. Past students have come from Australia, Hong Kong, Singapore, China, Japan, Pakistan, India, Venezuela, Israel, UK, Canada, Germany and France.

What is the average percentage of females in each class?

We average approximately 40% females in each class.

What can I do to prepare for the program?

While there are no advanced assignments. There are a number of interesting books on financial literacy, the role of computer science in the future of investing, etc. It is always helpful to watch the news in order to better understand how world news affects the global markets.

How far away is Bentley from Logan Airport?

Bentley is approximately a 30 minute cab ride from Logan (assuming no traffic.) We recommend you leave yourself at least 45 minutes travel time.

BENTLEY ADMISSIONS INQUIRIES:

Can I meet with an admissions counselor while I am attending Wall Street 101?

Yes, we will have a session during Wall Street 101 with an admissions counselor and you will be able to register for an interview while you are here.

Can I meet with one of the athletic coaches while I am on campus?

Yes, we recommend that you reach out to the coach prior to arrival to make sure he/she is on campus during your time at Bentley.

Does attending the Bentley Wall Street 101 Pre-College Program guarantee admission to Bentley?

No, however, attending Bentley's Wall Street 101 program and performing well will strengthen your application to Bentley, and any other university. Additionally, Wall Street 101 offers many opportunities designed to help you navigate the college application process and enhance your performance in a college setting.

If your inquiry has not been addressed, please contact Professor Jahangir Sultan, Founding Director, Trading Room, at tradingroom@bentley.edu