

# THE CLEARING CORPORATION CHARITABLE FOUNDATION FELLOWS PROGRAM

ANNUAL REPORT | 2017–2018



**ROOSEVELT UNIVERSITY**  
HELLER COLLEGE  
OF BUSINESS





Dear colleagues and friends,

With the start of the new academic year comes exciting and novel opportunities for our students at the Heller College of Business. I am particularly delighted to report on the recent achievements and growth of our Fellows Program in Finance, which is funded by the generous support of the Clearing Corporation Charitable Foundation (CCCCF). In addition to continuing the development of the CCCC Fellows Program, we are working with our University Honors Program to initiate a section that will involve a well-developed curriculum and purposeful professional mentoring program. This new section will advance the preparation and engagement of our highly talented and hard-working undergraduates for professional careers in finance. I invite you to learn more about the achievements of our CCCC Fellows Program and its students in this report.

I would like to acknowledge the efforts of Professor Tanweer Hasan, director of the CCCC Fellows Program, and Dr. Rifat Gorener, our new chair of the Accounting/Finance Department, for these new programs. Professor Hasan has worked very closely with our finance faculty and the Honors Program to develop this honors section and recruit mentors from the successful executives among our distinguished alumni and surrounding business community. Immediately upon his appointment in mid-July 2018, Dr. Gorener enthusiastically began working to facilitate the execution of the Honors section by developing the relevant courses, hiring qualified faculty, and working with Bloomberg LP so that our students can earn professional certification in Bloomberg Market Concepts (BMC). I sincerely admire, and am grateful for, the teamwork and leadership of Professor Hasan and Dr. Gorener on this program, which I am confident will ultimately promote our students' success both academically and professionally.

I am also excited to report two exciting events that will take place on October 22, 2018: the grand opening of our remodeled and renovated Financial Trading Room, and the kick-off of our Student-Managed Fund. The Trading Room will include additional Bloomberg terminals and new state-of-the-art technology that can better support distance teaching/learning pedagogy and enable a more collaborative learning environment. The Student-Managed Fund will serve as a crucial component of our finance students' experiential learning program, providing them with an opportunity to not only research and analyze investment opportunities and recommendations, but to make actual investments, and thereby truly understand the risks and rewards of their portfolio management and decisions. I strongly believe that the combination of the new Trading Room, Student-Managed Fund, and integration of Bloomberg terminals in more finance courses will create a more effective learning environment for our students.

I look forward to the sustainable growth of our new programs at the Heller College of Business, and to the success that our students will enjoy in their future careers as a result.

Sincerely,

**Asghar Sabbaghi, PhD**  
Dean and Professor of Finance and Information Systems



Dear readers,

It is my pleasure to present to you the third annual report of the Clearing Corporation Charitable Foundation (CCCCF) Fellows Program. The goal of the program is to build the next generation of highly skilled finance professionals to continue the legacy of success at the Heller College of Business (HCB). The CCCC Fellows Program provides undergraduate business students interested in finance and related careers the resources, tools and guidance needed to successfully reach their professional goals.

The third cohort for the 2017–18 academic year consisted of 10 fellows. All 10 fellows went through the required finance course work, attended a number of professional development workshops, obtained Bloomberg (BMC) certification and had paid internship placements. It is worth noting here that 94 percent

CATEGORY	NUMBER	PERCENT OF TOTAL
Female	23	38%
Hispanic	8	13%
African American	8	13%
First-generation	33	55%

(47 out of 50) of the students who went through this program in the last three years had meaningful internship experience. Demographically, in the past year, 70 percent of the fellows were female, 60 percent were first-generation college students and 20 percent were Hispanic. Promoting diversity in the financial workforce is a long-term goal of the

CCCCF Fellows Program and a look at the composition of cohorts (listed to the left) over the last three years will testify to that effect.

While it has been a fascinating personal and professional experience for me to work with groups of sharp, hard-working students over the last three years, I expect the new two-year Finance Honors Track starting Fall 2018 to be even more exciting and rewarding. This new honors track will mark a new era for the College of Business in offering the highest quality undergraduate finance program in the greater Chicago area. With additional funding of \$1.04 million from the Clearing Corporation Charitable Foundation, students accepted in the first three cohorts of the Finance Honors Track will get a total cash stipend of \$10,000, have opportunities to attend professional development workshops and seminars, visit corporate sites within and/or outside the U.S., participate in experiential learning projects and get involved in research with faculty members over the two-year period. Students are expected to take a preset sequence of courses in finance, write an honors thesis under faculty guidance and obtain an internship within the two-year period of the program. Each student accepted in the program will be assigned two mentors — one academic mentor and one executive (industry professional) mentor — for the duration of the program.

It has been a privilege and honor to be part of the program and I look forward to working with new cohorts of Finance Honors Track students in the coming years.

Sincerely,

**Tanweer Hasan, PhD**  
Executive Director of the CCCC Program  
Rolf Weil Professor of Finance  
Heller College of Business



# TABLE OF CONTENTS

[4]	Organizational Structure	[12]	Sophomore Bash: Finance Honors Track
[5]	The CCCF Fellows 2017-2018	[13]	CCCF Fellow Wins Financial Executive International (Chicago Chapter) Scholarship Award
[6-7]	Induction Ceremony 2017-2018	[14]	Internship Placement of CCCF Fellows 2017-2018
[8]	Professional Development Workshop: Resume Writing	[15]	Executive Mentoring Program
[8]	Professional Development Workshop: Interview Skills	[16-17]	Executive Mentors 2017-2018
[9]	Professional Development: MS Excel and MS Access Workshops	[18-19]	Testimonials
[9]	Professional Development: Bloomberg Market Certification (BMC)		
[10]	Professional Speaker Series: Bill Strauss		
[11]	Professional Speaker Series: John Keshner		

# ORGANIZATIONAL STRUCTURE

## STAFF



**DR. TANWEER HASAN**  
Executive Director  
CCCF Fellows Program



**TATIANA SOROKINA**  
Graduate Assistant, Fall 2017



**VICTORIA MISUNA**  
Graduate Assistant, Spring 2018

# THE CCCF FELLOWS: 2017-2018



**RITA  
AVDIU**



**BRIDGET  
CASCIO**



**LISA  
HESS**



**VALENTINE  
HODOS**



**PATRYCJA  
KOBESZKO**



**EDGAR  
LEON**



**BRENDA  
MUNOZ**



**JAKE  
MYERS**



**ROSHNI  
PATEL**



**KRISHMA  
SHARMA**



# INDUCTION CEREMONY OF 2017-2018 FELLOWS

Ten undergraduate students were selected for the third cohort of the CCCF Fellows Program during the 2017-2018 academic year. The induction ceremony was held on Friday, Oct. 20, 2017 and attended by a large number of alumni, executive mentors, faculty and staff, and the newly recruited fellows. Lois Becker, provost and executive vice president for academic affairs at Roosevelt University, welcomed the guests. The keynote speech was delivered by John O. Keshner, managing director and practice lead at Northern Trust. Two alumni of the CCCF Fellows Program, Sharee Zlatkova (2015-2016) and Allante Wallace (2016-2017), also spoke and reflected on their experience with the program.





## PROFESSIONAL DEVELOPMENT: WORKSHOP ON EFFECTIVE RESUME WRITING

The CCCF Fellows attended a workshop on effective resume writing on Friday, Sept. 29, 2017. The motivation behind this workshop was to ensure that the fellows learn to develop effective resumes and learn how to differentiate themselves from the competition for internship placement and the job market.



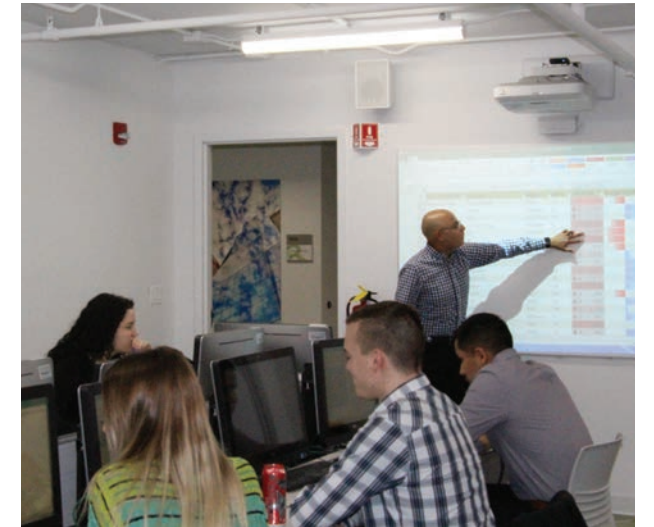
## PROFESSIONAL DEVELOPMENT: WORKSHOP ON INTERVIEW SKILLS

The workshop on interview skills, held on Friday, Oct. 6, 2017, provided the fellows with an opportunity to learn how to make a first impression on a potential employer, talk about their professional training and strengths, and increase the chance of being hired.



## PROFESSIONAL DEVELOPMENT: WORKSHOPS ON MS EXCEL AND MS ACCESS

The CCCF Fellows were required to attend two instructional sessions on basic and advanced MS Excel as well as a session on MS Access. The objective was to provide the fellows with rigorous training on MS Excel and MS Access to enhance their ability to succeed in a corporate environment.



## PROFESSIONAL DEVELOPMENT: BLOOMBERG MARKET CONCEPT (BMC) CERTIFICATION

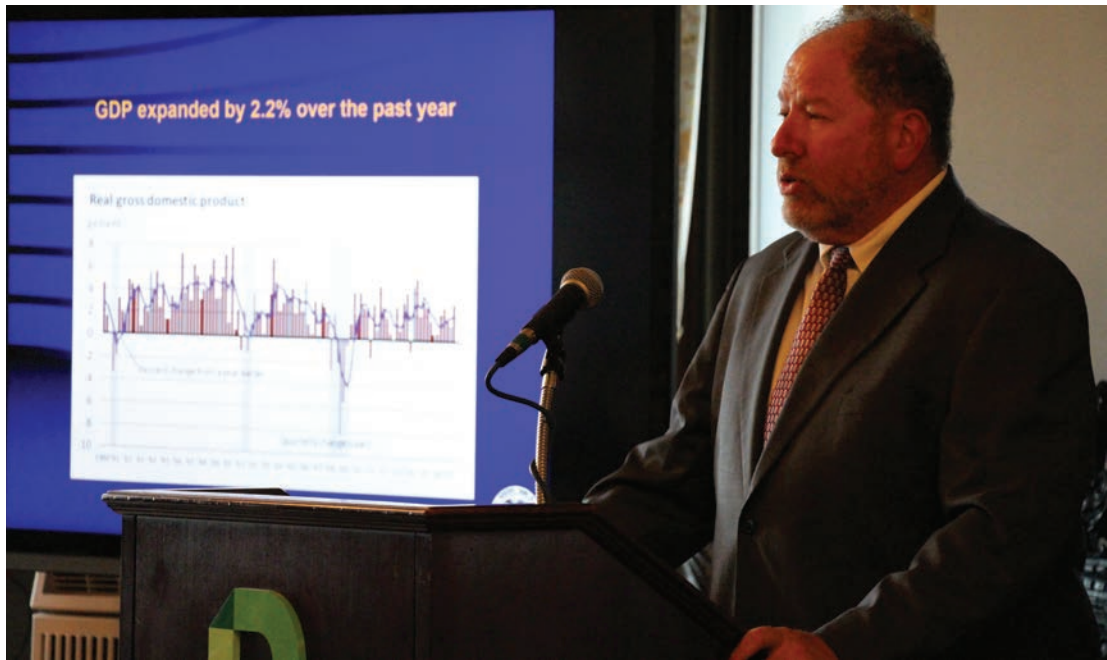
All CCCF Fellows are required to obtain Bloomberg Market Concept (BMC) certification using the Bloomberg terminals available in the Financial Trading Room. The BMC course is an eight-hour self-paced e-learning program and the CCCF Fellows received certificates upon completion. Bloomberg representative Brooke O'Brien held a workshop for the fellows on how to navigate Bloomberg terminals on Friday, April 20.





# PROFESSIONAL SPEAKER SERIES: BILL STRAUSS

An important part of the CCCF Fellows Program was a series of lectures given by industry professionals from various business areas. On Thursday, Oct. 26, 2017, the CCCF Fellows, along with other College of Business students, had an opportunity to attend a talk on economic outlook by Bill Strauss, a senior economist and advisor at the Federal Reserve Bank of Chicago. Strauss produces the monthly Chicago Fed Midwest Manufacturing Index and organizes the bank’s Economic and Automotive Outlook symposium.



# PROFESSIONAL SPEAKER SERIES: JOHN KESHNER

On Tuesday, March 20, 2018, John Keshner, managing director and practice lead at Northern Trust, gave a talk to CCCF Fellows and other HCB students on “Endowments and Foundations.” A large number of HCB students attended the event.





# SOPHOMORE BASH: FINANCE HONORS TRACK & PROFESSIONAL NETWORKING WITH NORTHERN TRUST

On Friday, March 23, 2018, the CCCF Fellows Program organized a “Sophomore Bash: Finance Honors Track.” The event was specially designed for current sophomore students, from HCB and other colleges, with dual objectives: to provide information on the Finance Honors Track program beginning Fall 2018, and an opportunity to network with industry professionals from Northern Trust. Ten executives from Northern Trust attended the event and encouraged students to apply for internships and/or full-time positions. Two CCCF Fellows were selected for prestigious summer internship positions at Northern Trust in the last two years, with one leading to a full-time job upon graduation.



# CCCF FELLOW WINS FINANCIAL EXECUTIVES INTERNATIONAL (CHICAGO CHAPTER) SCHOLARSHIP AWARD

Roshni Patel, a CCCF Fellow from the 2017-2018 cohort, won a scholarship of \$1,900, the second-highest category of scholarship sponsored by the Financial Executives International (Chicago Chapter), in February 2018. Students from eight different universities (University of Illinois Urbana-Champaign, Loyola University of Chicago, Aurora University, Dominican University, DePaul University, Northern Illinois University, and University of Illinois at Chicago) were nominated for the scholarship awards this year. All nominees go through a day-long interview process with different groups of Chicago-area senior executives and the winners in different scholarship categories are announced at the end of the day during the gala dinner. Two other CCCF Fellows from previous cohorts received similar awards from the Financial Executives International in the last two years, with one clinching the scholarship in the highest category in 2017.





# INTERNSHIP PLACEMENTS

The CCCF Fellows are expected to obtain internships as part of the program. This year, the 10 fellows had internships at the following organizations:

FELLOW	INTERNSHIP
Rita Avdiu	IGC Brand Services
Bridget Cascio	HAVI
Lisa Hess	Municipal Employees' Annuity and Benefit Fund of Chicago
Valentine Hodos	HonlapBirodalom
Patrycja Kobeszko	Latin American Chamber of Commerce (LACC)
Edgar Leon	AMP Futures
Jake Myers	Northwestern Mutual
Brenda Munoz	Midwest Business Consulting
Roshni Patel	Treasury Management Association of Chicago (TMAC) and Northern Trust
Krishma Sharma	StoneLux Design

# EXECUTIVE MENTORING PROGRAM

Eleven industry professionals volunteered their time to serve as mentors to the CCCF Fellows during the 2017-18 academic year. Mentors and mentees maintained contact throughout the academic year via email, social media and face-to-face meetings. Some mentors invited mentees to visit their workplace and attend professional meetings. A formal on-campus Mentor-Mentee Social was held on Tuesday, April 24, 2018 where mentees formally thanked their respective mentors for their time, effort and goodwill.





# MENTORS

The following professionals volunteered their time as mentors to the CCCF Fellows Program during the 2017-18 academic year:



**HEATHER ALGER**  
PNC Bank



**JEAN BOISSON**  
American Osteopathic Association



**GUADALUPE COTTO**  
OneGoal



**DAVID RUBIN**  
MB Financial Bank



**DANIEL SCHUETTE**  
PNC Bank



**SHERRI SO**  
BMO Harris Bank



**AMYLEE HARRIS**



**TRICIA KELLY**  
McDonald's Corporation



**DAWN ROMEI**  
Northern Trust



**TRACY TRICE-WATTS**  
Health Care Service Corporation



**PATRICIA YANCY**  
Health Care Service Corporation



## TESTIMONIALS: CCCF FELLOWS PROGRAM

“This opportunity has allowed me to grow as a professional and has opened up several opportunities. I’ve learned a lot including the entire Microsoft Office Suite, as well as obtain a Bloomberg Market Concepts certification. Additionally, the access to a mentor and networking opportunities has been indispensable. The various networking events taught me how to navigate the room as a professional, how to communicate, and how to make valuable connections. As a Hispanic woman in the business field, this program empowered me and gave me the confidence I needed to successfully initiate my career.”

“Because of this opportunity I was able to attain multiple internship opportunities and prepare myself to begin my professional career. With the constant support from Dr. Hasan, the fellows and my mentor, I feel confident stepping into the professional world and beginning my journey.”

“Attending networking events let me learn about career opportunities I did not have access to. It opened my eyes to further research what I could possibly choose to take more interest in after graduation. I know I speak for all the fellows when I say what we learned from this program will go a long way — not only as students, but also as we pursue our career paths as Roosevelt University alumni.”

“Since I became a CCCF Fellow, I was able to gain a lifetime mentor who is willing to give me advice and guidance whenever needed. I started an internship which will eventually lead into a full-time job and created new contacts through various events hosted by the CCCF Fellows Program.”

“I have the privilege of calling myself a CCCF Fellow for the 2017-2018 cohort. When Dr. Hasan told our class about the opportunity to apply for this program, I never would have thought I could have had this eye-opening experience. The exposure I received from this program went above and beyond what I would have seen by just being a regular business student. I have been able to have life-changing conversations with business executives, attended workshops that have dramatically enhanced my abilities, and created strong personal relationships with the other fellows in this program. My mentor has greatly assisted me with any questions I had and she was of great guidance to me when I needed it most. None of this would have been possible without the CCCF Fellows Program.”

“I have been lucky to gain two internships, one at the Treasury Management Association of Chicago and one at Northern Trust. I would like to thank the foundation for all the opportunities I have received!”







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