

GENERAL FINANCE WORKSHOP

UC SANTA BARBARA



Summer 2023 Newsletter

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Last Year's Leadership



Ashwin Soitkar

- Graduated in 2023
- Financial Math & Stats Major
- Previous FC Co-President
- Analyst @ Intuitive
- Enjoys soccer!



Matt Neidre

- Graduates in 2025
- Economics Major
- Intern @ Galaxy Venture Capital
- Likes Rock Climbing!

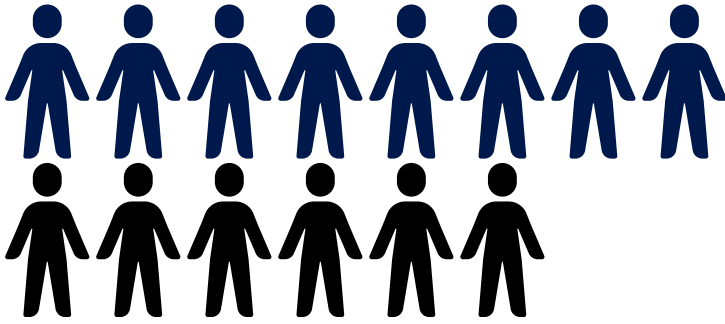


Demitri Stamos

- Graduates in 2025
- Classics Major
- Intern @ Graystone Capital Advisors
- Loves Golf!

Last Year's Members

14 Total Members



8 Freshmen

6 Sophomores

10 received internship offers!



Alex Weinzimer



Amber Yeh



Athena Tran



Deanna Hu



Gavin Silakul



Nathan Calilung



Sabrina Song



Kate Vainoris

Not Pictured: Andrew Jeong, Chi-Jui Wu, Isaac Martinez, John Ji, Leon Li, Taylor Weinstein

Workshop Highlights

UC SANTA BARBARA
FINANCE CONNECTION

General Finance Workshop – Assignment #7

Mock Interview: March 8-12, 2023

Objective

Mock interview preparation

Task

Prepare for the mock interview. These should be memorized.

Mock Interview

Logistics

- In-person
- Around 20 minutes
- No dress code
- Ashwin, Matt, or Demetri will reach out to schedule a time

Content

- Story / elevator pitch
- Various behavioral questions
 - Know how to use the STAR method
- Technical questions (only ones we have covered)
 - Walk me through the 3 financial statements
 - What is the general structure of the Income Statement?
 - What is the general structure of the Balance Sheet?
 - How do you calculate Gross Profit?
 - What does EBIT stand for? How do you calculate EBIT?

There is no submission required for this assignment. We will be reviewing the material during the next meeting, but we suggest that you start preparing before then.

Reminders

If you have any questions, need any clarification, or want to get some individual practice, feel free to let us know. Any changes/additions to this assignment will be sent in the Slack.



Walk me through how an increase in Depreciation by \$10 would affect the 3 financial statements.

Leadership 2023-2024



Matthew Neidre

- Graduates in 2025
- Economics Major
- Intern @ Galaxy Venture Capital
- Likes Rock Climbing!



Demitri Stamos

- Graduates in 2025
- Classics Major
- Intern @ Graystone Capital Advisors
- Loves Golf!



Kate Vainoris

- Graduates in 2026
- Financial Math & Stats and Economics Major
- Intern @ Youtheory
- Loves Soccer!



Amber Yeh

- Graduates in 2026
- Econ/Accounting and Stats/Data Sci Major
- Intern @ PwC
- Plays Badminton!

Workshop Overview

Networking

How to get in contact with people in the industry

Behavioral Interview Questions

How to answer "about you" questions

Technical Interview Questions

Interview-specific accounting and valuation knowledge

10-K Analysis and Financial Modeling

Introduction and analysis to financial statements

Excel and Resume Guidance

Excel tools and enhance your resume

————— **AND** —————

Weekly meetings & assignments

End of quarter mock interviews / superdays

Guest Speakers

Current event presentations

Social events

How/Why to Join

Why Join? _____

- Learn valuable skills for finance interviews
- Provides structured advice applicable to all finance verticals
- Resume and Cover Letter reviews
- Access to exclusive networking events and informational sessions
- Increased exposure to internships / full-time opportunities

Requirements To Join _____

- Application with short answer section and resume
- Finance Connection Membership
- Resume formatted with Mergers and Inquisitions template
- 20 minute interview
- A strong work ethic and determination
- Prior Finance/Accounting experience preferred, but not required
- Freshmen and Sophomores preferred

Timeline _____

- Application opens early Fall Quarter
- Interviews in Week 8 / 9
- Workshop starts beginning of Winter Quarter
- Continues through end of Spring Quarter

Contact Us

Questions About Finance Connection?

Email: fc.ucsb@gmail.com

Website: ucsbfinanceconnection.com

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

Questions About GFW?

gfw.ucsb@gmail.com

