

YOUNG BUSINESS ALLIANCE
LINDA WILSON
MARCH 7, 2017

BACKGROUND



- Westminster, CA
- Family
- Softball ←
- Westminster High School
- The University of Notre Dame
- Goldman Sachs - Chicago
- Kellogg School of Management
- Goldman Sachs - Los Angeles



CHOOSING MY CAREER PATH

- **Meeting with Carl Ackerman**
 - Use your resources - ask for help
 - Put some time in to it - you don't have to get it right the first try but you should be thoughtful
- **Things to Consider**
 - Skills and Characteristics
 - What do you like - what do you enjoy
 - The Big Five for Life
 - Company Culture
- **Plan of Action**
 - Hold yourself accountable
 - Measurable goals and timely check ins

GOLDMAN SACHS

PRIVATE WEALTH MANAGEMENT - CHICAGO

Financial Analyst → Financial Investment Professional

1. Client Relationship Management

2. New Business Development

3. Team Management

* Office Engagement

Tuesday, February 21, 2017

GOLDMAN SACHS

PRIVATE WEALTH MANAGEMENT - LOS ANGELES

Private Wealth Advisor

1. New Business Development!!!
2. Client Relationship Management
3. Team Management

Tuesday, February 21, 2017



- John and Jane are married with two kids.
- They start a business together.



- They work really hard to build that business.
- Then they work even harder to grow it.
- The business is very successful.

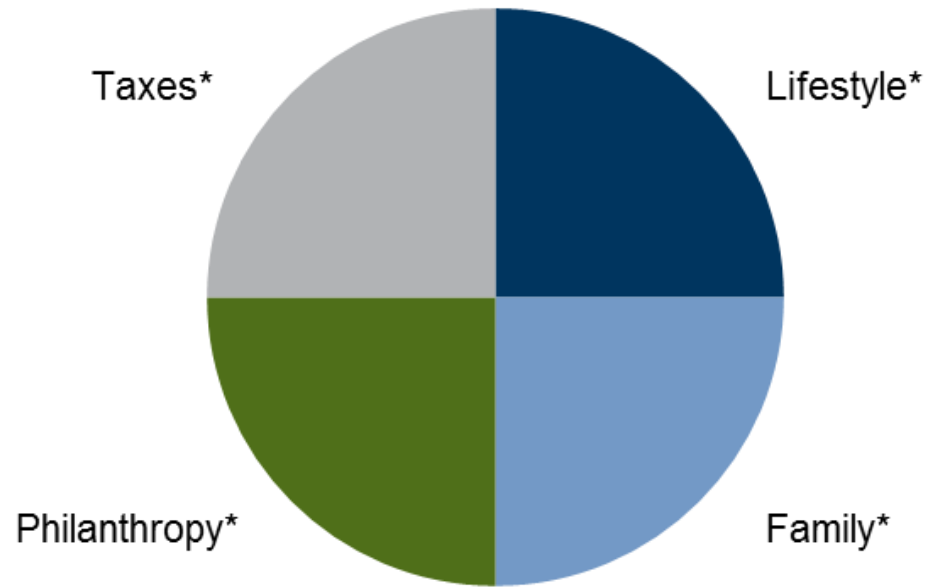


- One day a big company reaches out to them.
- They want to buy their business for \$100 million.
- John and Jane hire advisors and sell the business.



1. There are 4 things that John and Jane can do with their money. What do you think they are?
2. What is investing? Why do people invest?
3. What does it mean to be diversified in your portfolio?
4. What are some different asset classes people invest in?

1. There are 4 things that John and Jane can do with their money. What do you think they are?



2. What is investing? Why do people invest?

Investing is the act of putting money to work with the expectation of growing one's assets over time.

- Assets and Liabilities
- Inflation



3. What does it mean to be diversified in your portfolio?

Selecting the right balance between assets to deliver returns over the long-run and having enough protection to withstand market crises over the short-term.



4. What are some different asset classes people invest in?

Investment Grade Fixed Income	Non-Core Fixed Income	Public Equities	Hedge Funds	Private Equity	Real Estate
<ul style="list-style-type: none"> ▪ Dampens volatility ▪ Provides cash flow ▪ Hedges one's portfolio during a crisis ▪ Acts as a deflation hedge 	<ul style="list-style-type: none"> ▪ Exposes portfolio to different sources of credit risk ▪ May produce high income 	<ul style="list-style-type: none"> ▪ Long-term appreciation potential ▪ Inflation hedge over long time horizon ▪ Exposure to global economic growth through international diversification ▪ Currency exposure through international equities 	<ul style="list-style-type: none"> ▪ Diversified portfolio of hedge funds dampens overall portfolio volatility ▪ Offer actively managed short and long-term trading strategies across a diverse universe of investments ▪ Exposure to potential alpha from active management 	<ul style="list-style-type: none"> ▪ Participation in value creation through investments in innovative ideas or operating improvements ▪ Can increase potential returns of overall portfolio ▪ General persistence of performance in top third of managers provides exposure to higher potential alpha from active management 	<ul style="list-style-type: none"> ▪ Provides high and relatively stable income ▪ Diversification benefit through a distinctive profile of exposures to systematic risk factors ▪ Uncorrelated and persistent source of alpha through public REIT managers

LINDA'S PERSONAL TAKEAWAYS

1. Be Nice to People - It will get you far.
2. Someone always has it worse than you. Don't whine and complain.
3. Put your cell phone away - engage with people - you will learn.
4. Attitude is more than half the battle - positive, energetic, team player, eager to learn.
5. Be gritty! Figure out how to get what you want.
6. Take time for reflection and write your goals down on paper!
7. Pay attention to detail, but also take a step back and think big picture.
8. Build your team of advisors. Maintain them and add to them throughout your life. Use them!

Friday, February 24, 2017

QUESTION AND ANSWER