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2017

NOVEMBER 2-3
1:00-7:00pm



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Approved courses include:

- MATH 105A. Numerical Analysis
- MATH 107. Numerical Differential Equations
- MATH 115. Mathematical Modeling
- MATH 117. Dynamical Systems
- MATH 121A. Linear Algebra
- MATH 120A. Introduction to Abstract Algebra
- MATH 130A. Probability and Stochastic Processes
- MATH 133A. Statistical Methods with Applications to Finance
- MATH 140C. Analysis in Several Variables
- MATH 176. Mathematics of Finance

Students interested in the concentration in Mathematical Finance are welcome to contact the academic counselors in the School of Physical Sciences Student Affairs by email at pssazot@uci.edu or phone at (949) 824-6507 to inquire about degree requirements.

Please visit www.math.uci.edu for additional information.

UCI Department of Mathematics

CONFERENCE WELCOME MESSAGE

We hope this conference will peak your interest and desire to work in this fast-paced, highly relevant career field known as Finance. We have brought together a string of working professionals, many of whom have graduated from UC Irvine, to educate and encourage you into the right career choice.



The Pursuing Finance Conference is headed by Hyung J. Kim, CFP, CEO & Portfolio Manager at an Irvine-based investment firm, KLK Capital Management. Prior to establishing his own hedge fund, Hyung served as the Vice President of Wealth Management at Merrill Lynch, with more than 15 years of experience in the finance industry. At Merrill, Hyung started fostering both undergraduate and graduate student interns' interests and career aspirations in finance, security investment and asset management. Many of Hyung's interns were UC Irvine students with major concentration in accounting, economics, finance mathematics, or even PhD candidates. Under his mentorship, Hyung's interns have gone to pursue professional career in investment banking, consulting, quantitative analysis, and auditing.

We are grateful to collaborate with Professor Solna, Hyung's long-time friend, on this event. Professor Solna is currently a faculty member in the mathematics department at UC Irvine, and his research has focused around Random Media, Parabolic scaling and waves, econometrics, multiscale stochastic volatility Equity, interest rates and credit derivatives. His academic focus helped mentor many mathematics PhD students at UC Irvine, who are now successful in quant analytics related career fields.

AGENDA

Thursday, November 2, 2017 – Day One

1:00pm - 1:30pm	Conference Overview and Welcoming
1:35pm - 2:30pm	Featured Speaker: Joshua Feuerman, CFA Managing Director, JPMorgan Global Economy
2:30pm - 2:40pm	Break/ set up
2:40pm - 3:30pm	Panel: Auditing Professionals in this field will share their experiences and answer any questions.
3:30pm - 3:40pm	Break
3:40pm - 4:30pm	Featured Speaker: Immanuel Tan, CFA Vice President, Goldman Sachs Big Data from an Investment standpoint with an emphasis of quantitative analysis
4:30pm - 4:40pm	Break/set up
4:40pm - 5:30pm	Panel: Quantitative Analysis Professionals in this field will share their experiences and answer any questions.
5:30pm - 5:40pm	Closing Remarks
5:40pm- 7:00pm	Networking Please join us for a time to network with professional panelists and guest speakers. Refreshments are provided.

Friday, November 3, 2017 – Day Two

1:00pm - 1:30pm	Conference Overview and Welcoming
1:35pm - 2:25pm	Featured Speaker: Adam Fingersh SVP Head of Operations and Chief Strategist, Experian Big Data and Decision Analytics
2:30pm - 2:40pm	Break/ set up
2:40pm - 3:30pm	Panel: Consulting Professionals in this field will share their experiences and answer any questions.
3:30pm - 3:40pm	Break
3:40pm - 4:10pm	Featured Speaker: Alison Schiraldi, CFA SVP Account Manager, PIMCO Fixed Income Security and Asset Management
4:10pm - 4:20pm	Break/set up
4:20pm - 5:10pm	Panel: Investment Banking Professionals in this field will share their experiences and answer any questions.
5:10pm - 5:20pm	Break/set up
5:20pm - 5:40pm	Featured Speaker: Hannah Cho Current UCI student She will be sharing her experiences as an intern at Bloomberg.
5:40pm - 5:50pm	Closing Remarks
5:50pm- 7:00pm	Networking Please join us for a time to network with professional panelists and guest speakers. Refreshments are provided.

Featured Speakers



Joshua Feuerman, CFA

MANAGING DIRECTOR
JPMORGAN

Mr. Feuerman is a Senior Equity Client Portfolio Manager at JPMorgan. Josh joined the firm in 2012 from Foundation Capital Partners, where he served as Chief Risk Officer. Previously, Josh ran his own investment firm, Btn Partners, where he managed a quantitative market neutral hedge fund. Prior to founding Btn Partners, Josh was Vice Chairman of the Investment Committee and Head of Global Quantitative Equities at Deutsche Asset Management. Josh was also Head of Active International Equities at State Street Global Advisors in Boston and an adjunct lecturer in the Finance Department at Pace University. Josh holds an A.B. in Economics and Romance Languages from Bowdoin College and an M.B.A. in Finance from the University of Chicago Graduate School of Business.

Josh will be giving a presentation on Global Economy and Equity Market at the conference.



Immanuel Tan, CFA

VICE PRESIDENT
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Mr. Tan is a Vice President within GSAM's Third Party Distribution Product Strategy Group and head of equity product strategy. In this role, he is responsible for the positioning of GSAM equity funds. Prior to joining Goldman Sachs, Immanuel was a platoon commander in the Singapore Armed Forces. Immanuel received a B.S. in Business from Babson College.

Immanuel will be giving a presentation on Quantitative Analysis and Data Rich World.



Alison Schiraldi, CFA

SVP ACCOUNT MANAGER
PIMCO

Ms. Schiraldi is a senior vice president and account manager in the Newport Beach office, focusing on institutional client servicing. Prior to joining PIMCO in 2012, she was an investment analyst on the private equity secondaries investment team at Morgan Stanley Alternative Investment Partners (AIP). Previously, as a product manager at Morgan Stanley Investment Management (MSIM), she developed and launched alternatives funds for institutional and retail investors. She has nine years of investment experience and holds an MBA from the Wharton School of the University of Pennsylvania. She received her undergraduate degree from Cornell University.

Alison will be giving a presentation on Fixed Income Securities and Asset Management at the Conference.



Adam Fingersh

SVP HEAD OF OPERATIONS &
CHIEF STRATEGIST
EXPERIAN

Mr. Fingersh is the senior executive responsible for operations and strategy for Experian's Analytics, Software and Fraud/Identity Solutions businesses in North America. Before joining Experian, Adam worked for Oracle Corporation and BearingPoint, Inc. (formerly KPMG Consulting), leading consulting programs to develop and deliver business process strategies and business information systems for large clients including Agilent, Gap, and Qualcomm among others. Adam is a recipient of the Ernst and Young "Entrepreneur of the Year" Award and a Lifetime member inductee to the "American Entrepreneurs Hall of Fame." Adam holds a Master of Business Administration with top honors from the University of California, Irvine and a Bachelor of Science in business administration from the University of Colorado, Boulder.

Adam will be giving a presentation on Big Data and Decision Analytics at the Conference.

Meet the Panelists

AUDITING | CONSULTING | QUANTITATIVE ANALYSIS | INVESTMENT BANKING |

AUDITING



Harrison Tan

Harrison Tan is currently a senior analyst at Westfield in the Los Angeles corporate office. Prior to joining Westfield, he was a senior analyst on the North America Finance team at Coach Inc, where he managed the capital and real estate strategy. Previously, Mr. Tan was an analyst for the health care investment banking group at Cowen and Company, primarily working on equity transactions (IPOs, follow-ons, etc.). Harrison graduated from UC Irvine with a B.A in Business Economics.

Janet Chang

Janet Chang graduated from the University of California, Irvine, with her bachelors in business economics and accounting. She proceeded to work in public accounting in Los Angeles as a certified public accountant for 4.5 years, providing audit and assurance services for not-for-profit and health care clients. She also enjoys staying active in her local community playing sports or volunteering for the Habitat for Humanity. She has now transitioned to working on business opportunities within the health care industry.



Lisa Kim

Lisa Kim is a second- year auditor at PricewaterhouseCoopers in LA. She started with the firm as an intern during her third year at Pepperdine University, where she graduated with an accounting major. She started working full-time for the firm in October 2016. She currently works within the Technology, Media, and Telecommunications (TMT) industry. Some of the clients she has worked with include: Leaf Group Ltd., SpaceX, Sony Entertainment and Disney Studios. She is currently studying for the CPA exams and hopes to finish by the end of the year.



Malav Mehta

Malav Mehta graduated in UCI's class of 2010 with a BA Business Economics with an accounting minor. He spent 3.5 years at BDO USA LLP in the audit practice both Orange County and San Francisco. His primary clients ranged within the healthcare, manufacturing, and venture capital industries. He is now an Audit senior with a CPA license and has since transitioned to finances, spending 2.5 years at Theravance Biopharma. Currently, he works for Apple, Inc. within Operations Finance directly working with procurement teams for the iPhone line of business.



QUANTITATIVE ANALYSIS



Hua Lv

Hua Lv is a quant at Wells Fargo Securities. He is the main quant working with multi-million interest rates liquid products trading business. He focuses on developing mathematical models for pricing and risk management of various derivative trading desks, including interest rates swap desk and treasury desk at United States, Britain and Japan. Prior to joining the financial industry, Hua Lv studied and received his Ph.D in Mathematics at University of California Irvine. Hua Lv lives in Charlotte, North Carolina

Kevin Gong

Kevin Gong was a UCI PhD student in the Department of Mathematics from September 2007 to May 2013, and was Mr. Kim's intern from March 2012 to June 2012. After graduation, he worked at Mathworks Inc and built functions in Financial Toolbox for pricing, modeling, and analyzing various kinds of options using finite differences methods. He currently works at Wells Fargo Securities, where he is now a Quantitative Analyst. Kevin is working in model validation group. His main duties are model validation, benchmarking model development, and model risk management.



Jack Long

Jack is currently a Software engineer at Google. He is responsible for building forecast models for various Content Ads products in AdWords Next. Prior to joining Google, he worked at the Mathworks Inc and built functions in Financial Toolbox for pricing, modeling and analyzing various kinds of options using finite difference methods. He also Interned at J.P. Morgan and Merrill Lynch for doing quantitative research.

BLOOMBERG



Hannah Cho

Hannah Cho is currently a fourth year student at UCI studying Economics. This past summer, she worked at Bloomberg L.P. in New York City as a product analyst, working in rotations with the analytics and sales teams. Following graduation, she will be joining them in a full-time role after participating in a month long volunteering program in rural Africa. Aside from professional work and school, Hannah enjoys various physical pursuits, including kickboxing and long distance running.

CONSULTING



Karen Feng

Karen Feng is a Senior Consultant in the Ernst & Young LLP Advisory Services practices in Los Angeles California. She has over four years of consulting experience, focusing on assisting traditional banks/financial institutions as well as financial technology companies in the areas of regulatory compliance. Karen assists in the development of compliance management system frameworks, with her areas of focus including: Bank Secrecy Act (BSA) / Anti-Money Laundering (AML) compliance, consumer compliance (CFPB black letter regulations), and bank holding company investments compliance (FRB Reg Y and Reg K). Karen is a holds a bachelor's degree in Business Economics from the University of California, Irvine.

Skyla Robinson

Skyla is a senior auditor in the Global Internal Audit group at Experian, PLC. Skyla is engaged in various risk-based audit projects across Experian business units, where she assesses the business operational excellence. In her position, she also identifies systematic and manual gaps within established procedures and provides process improvement opportunities for business leaders. Prior to joining Experian, Skyla was a senior associate under the Business Advisory consulting practice at Grant Thornton LLP. There she served as the liaison between the client and the internal advisory team on various IT, regulatory-compliance framework, and process improvement consulting engagements. Skyla graduated magna cum laude from UC Irvine with a B.A. in Business Economics.



Tim Yau

Tim received his Bachelor of Science degree in Business Administration with an emphasis in Management from USC's Marshall School of Business. Tim is a consulting analyst at Cognizant, with a concentration in healthcare. He holds a certification in Lean Six Sigma and served as the project leader for a client. Prior to joining Cognizant Business Consulting, he has had over two years of experience in data analytics and financial modeling, including M&A due diligence. His past internships include UBS Financial Services and KLK Capital Management.



William Kwak

William Kwak interned with Mr. Hyung Kim at Merrill Lynch in 2011-2012 along with Karen Feng and Kenneth Lui. He graduated from UC Irvine in 2013 with a Bachelors in Business Economics and a minor in Accounting. After graduation, he began working at Nathan Associates, an economic consulting firm. He continues to work at Nathan Associates as a Senior Research Analyst while serving as a board member of UCLA Anderson School of Business' Riordan Programs Alumni Association.



+ Eric Sponberg, Actuarial Science

INVESTMENT BANKING

Ash Aggarwal



After graduating from U.C. Berkeley, Ash Aggarwal began his career in Investment Banking at J.P. Morgan. There, he worked broadly across technology sectors on buy and sell-side M&A, IPO, strategic defense, private placement, convertible derivatives, leveraged finance and securitized call-spread advisory. Ash later moved to Berlin as part of the startup, Vungle, the leading mobile in-app video advertising platform. Ash decided to move back to San Francisco and focus on enterprise software sales. After helping build out the sales team at Intercom, he is currently focused on field sales at FinancialForce. When he's not outside doing something physically active, you can likely find Ash planning his next travel adventure.

Connor Nguyen

Connor Nguyen is currently working at Salem Partners, a boutique investment bank based in Santa Monica. He works mostly on sell-side advisory, leveraged buyouts, and capital raising assignments for various industries, including real estate, media & entertainment, aerospace & defense, and healthcare & life sciences. Prior to joining Salem, he interned at Roth Capital Partners in Newport Beach as an equity research analyst and provided sell-side research in cleantech and industrial sectors. Prior to that, he interned at Harvey & Co., a middle-market merchant bank, and assisted with the deal origination process.



Sylvester Malapas

Sylvester Malapas is currently a Senior Equity Research Analyst at Strategic Global Advisors, an asset manager in Newport Beach. His primary responsibilities include fundamental analysis and due diligence. He previously was an analyst at Standard & Poor's Ratings Services in San Francisco where he focused on high yield credits within the software and services technology sector. Prior to business school he spent four years at Merrill Lynch Bank of America where he supported the trading desk and compliance officer. Sylvester received his BA in Economics from UC Irvine, and his MBA from the Johnson School at Cornell University.

Harrison Tan

Harrison Tan is currently a senior analyst at Westfield in the Los Angeles corporate office. Prior to joining Westfield, he was a senior analyst on the North America Finance team at Coach Inc, where he managed the capital and real estate strategy. Previously, Mr. Tan was an analyst for the health care investment banking group at Cowen and Company, primarily working on equity transactions (IPOs, follow-ons, etc.). Harrison graduated from UC Irvine with a B.A in Business Economics.



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