



CANADIANS 4 CANADIANS (C4C)

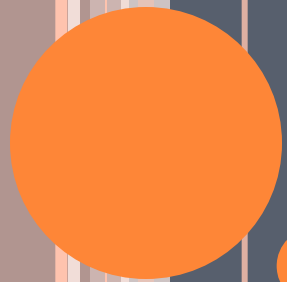
**Proposal to The Urban Financial Services Coalition
(Toronto Chapter)**

March 2010

“A mentor is someone whose hindsight can become your foresight” - Anonymous

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INTRODUCTION



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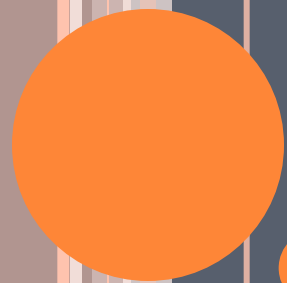
- The following presentation is a proposal to The Urban Financial Services Coalition (UFSC) Toronto Chapter regarding mentorship opportunities for current and prospective members
- Canadians 4 Canadians (C4C) is offering to provide UFSC a monthly mentorship program catered to the “young” UFSC members (high school students, undergraduates, or early career) who are interested in careers finance or consulting
- This presentation will address the following:
 - Need for a mentorship program
 - Overview of the C4C Mentorship Program
 - Benefits to UFSC Toronto

INTRODUCTION (CONT'D)

- There is a need for mentorship in the visible minority community, especially those who would like to pursue careers in finance or consulting
- Today, there is shortage of young visible minority professionals who are on the right path to having successful careers in finance or consulting because of lack of mentorship and/or lack of awareness of career opportunities
- Furthermore, there is a low number of visible minorities who graduated from business schools making it extremely difficult for high school students and undergraduates to become exposed to careers in finance or consulting
 - 5 black students (out of 300) graduated from the Richard Ivey School of Business in 2007. Two of these students pursued careers in finance

INTRODUCTION (CONT'D)

- C4C is proposing to offer a monthly mentorship program that will help bridge the gap between those who aspire to work in the financial or consulting sectors to those who already work in these fields
- The calls will take place each month, consisting of a C4C moderator, a C4C mentor and 5+ mentees. Each C4C mentor will only host one session (unless there is a demand for them host more than one)
- The Mentors are Canadian citizens who obtained degrees from Canadian Universities and are currently working in the financial or consulting sectors in Canada (i.e. Bay Street) or the US (i.e. Wall Street)
 - Mentors will provide their experiences in undergrad and how they were able to obtain and master their current jobs
 - Mentors will also provide information on their future plan and share tips that helped them to succeed (“key success factors”)
 - Mentors will also be open to having relationships with mentees after the session



C4C MENTORSHIP PROGRAM OVERVIEW

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- The C4C mentorship program will consist of three main components: C4C moderator, C4C mentors and mentees

C4C Moderator

Renee Reid will be the moderator for the C4C mentorship sessions. Her responsibility will include securing mentors for the sessions and leading the sessions. Renee will also be the point person for C4C (organizer).

Mentees

Mentees are members of UFSC Toronto chapter who are either in high school, undergrad or recent hires who have an interest in careers in finance or consulting.

C4C Mentors

C4C Mentors will be individuals who are in their early stages of their careers (graduated from a Canadian institution 2-5 years ago) and are currently working in the finance or consulting in Canada (i.e. Bay Street) or the US (i.e. Wall Street).

C4C MENTORSHIP PROGRAM OVERVIEW (CONT'D)

At the beginning of each month UFSC will email members about an upcoming C4C mentoring session that will take place during that month (**exact time will be determined**). Renee Reid (C4C organizer) will provide USFC with a bio of the C4C mentor to include in the email

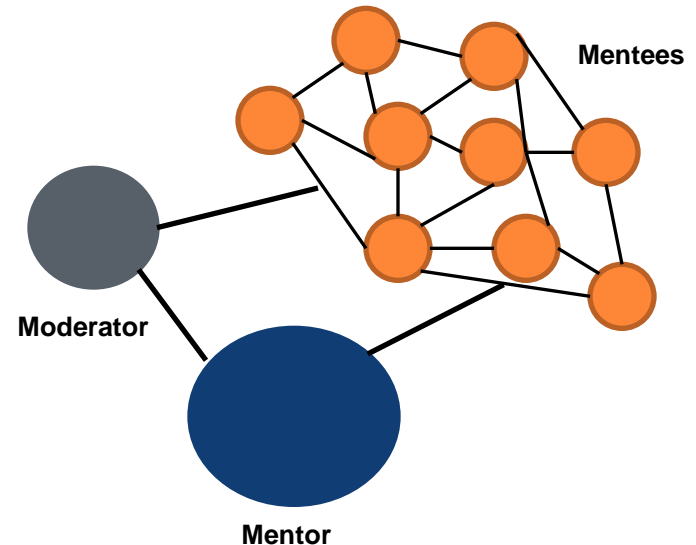
Members who are interested in this session will RSVP to UFSC and Renee. In addition, members will provide questions they would like to be addressed during the session

UFSC will provide mentees and Renee with a dial in for a call and Renee will pass along this information, along with the prepared questions to the C4C mentor

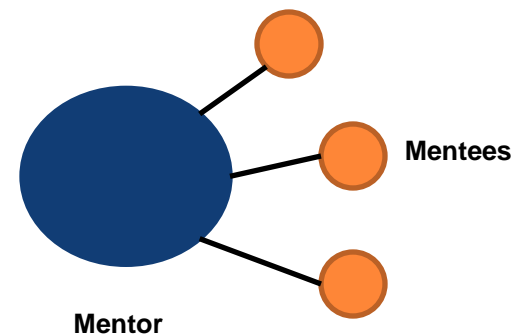
The call will be approximately 1 hour in length (with the last 30 minutes for Q&A). The session will allow mentees to have an open dialogue with the moderator, mentor and other mentees (**The "3M" Network**)

Mentees will have an opportunity to connect with the mentor following the call with the hopes of creating a strong bond between the mentor and mentee (**the "2M Network**). Renee will provide the mentor's contact information following the session

The "3M" Network



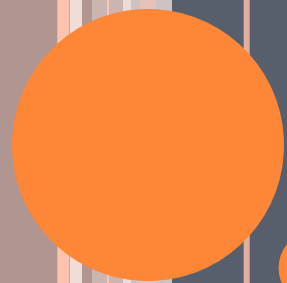
The "2M" Network



C4C MENTORSHIP PROGRAM OVERVIEW (CONT'D)

- **2 min:** Welcome address from C4C Moderator
- **30 min:** Message from C4C Mentor
 - C4C Mentor will kick off session by sharing his or her background with the group
 - C4C Mentor will discuss his or her experience in undergrad, work environment (past and current) and discuss their next steps
 - C4C Mentor will share his or her helpful tips (“key success factors”) to the group
- **20-30 min:** Q&A
 - C4C Mentor will answer prepared questions from the C4C Moderator*
 - Mentees will have the opportunity to ask additional questions
- **2 min:** C4C Moderator will conclude the session

**Questions will come from mentees when they RSVP for this session*



C4C MODERATOR AND MENTORS



C4C MODERATOR AND MENTORS

Renee Reid: Moderator

Renee Reid graduated with from the University of Western Ontario in 2007 with degrees in Chemical Engineering and Business from the Richard Ivey School of Business. Post graduation, she worked as an analyst in the healthcare group at UBS Investment Bank in New York City for two years. She also completed a summer internship at UBS in the summer of 2006 through the SEO program. She is currently working for the Special Assistant to the CEO of a non profit organization in Boston.

Anuroop Duggal: Mentor

Anuroop Duggal graduated with from the University of Western Ontario in 2007 with degrees in Electrical Engineering and Business from the Richard Ivey School of Business. Anuroop graduated the top of his class in both programs. Post graduation, Anuroop moved to New York City to work as an analyst at Goldman Sachs Investment Partners. Anuroop spent summer 2005 in the Technology, Media and Technology group at Goldman and summer 2006 at Goldman Sachs Investment Partners.

Lorcan Kilmartin: Mentor

Lorcan Kilmartin graduated with from the University of Western Ontario in 2007 with degrees in Industrial Engineering and Business from the Richard Ivey School of Business. Post graduation, Lorcan moved to Los Angeles to work as an analyst in the generalist group at Credit Suisse. Lorcan also completed a summer internship at CS in the summer 2006. Lorcan is currently working as an associate at the private equity firm, Oaktree Capital, in Los Angeles.

OTHER C4C MENTORS

Finance

Equity Research

• **Chase Bethal:** Associate, Desjardin (*Toronto*)

Hedge Fund

• **Mark Dorneanu:** Analyst, Marathon Partners LP (*NYC*)

Investment Banking

• **Colin Lynch:** Former IB Analyst, Morgan Stanley (*Toronto*); HBS 2011 Candidate

• **Jackie Uyham:** Associate, UBS Investment Bank (*Toronto*)

• **Neha Bhasin:** Former Analyst, TD Bank (*NYC*); Richard Ivey School of Business 2011 Candidate

Private Equity

• **Alyza Tarmohamed:** Associate, Tri-Artisan (*NYC*)

• **Aparna Bedi:** Associate, Goldman Sachs Private Equity Group (*NYC*)

• **Harish Venkatesh:** Associate, KKR (*Los Angeles*)

• **Colin Evran:** Associate, Bain Capital (*Boston*)

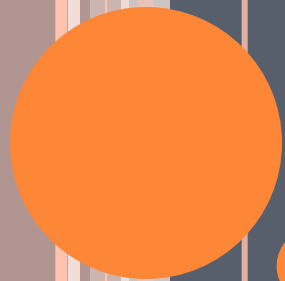
• **Nicole Fich:** Associate, Onex Partners (*Toronto*)

Consulting

• **Alyza Keshavjee:** Former consultant, The Boston Consulting Group (*Toronto*); HBS 2011 Candidate

• **Radhika Ray:** Former consultant, McKinsey & Company (*Toronto*)

• **Maliha Shekhani:** Consultant, Oliver Wyman (*NYC*)



BENEFITS TO UFSC TORONTO

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- The C4C mentorship program will provide many benefits to UFSC Toronto

Increase Mentorship

- UFSC Toronto currently has **30 members** who are undergrads or young professionals
 - Mentorship program will help UFSC attract young members because it caters to the needs of these individuals
 - Current members will promote these sessions by word of mouth to their classmates and/or colleagues

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Strengthen Organization Mentorship

- C4C Mentorship Program is in line with UFSC Toronto's objectives. The Program will:
 - Promote career and professional development
 - Promote economic empowerment in the community
 - Encourage minority youth interested in the financial services sector
 - Create awareness of opportunities available in the financial services industry

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Flagship for Other Chapters

- This unique program will allow the Toronto Chapter to stand out from the other 22 UFSC chapters across Canada and the United States as a result of increase membership and overall fit with UFSC's goals
- The success of this program could act as a "flagship" for other UFSC chapters to adopt

Contact Information

Renee Reid

Email: rreid.hba2007@ivey.ca

Cell: 646-465-1325