

FINANCIAL SERVICES



WHY STUDY FINANCIAL SERVICES AT BRYANT?

Accomplished Financial Services faculty enrich your classroom learning with their decades of real-world experience and success in the field.

- Our program combines accounting, institutions and markets, investments, law, marketing and selling, and risk management to provide you with a *purposeful, interdisciplinary, and hands-on education.*
- Complete a self-paced e-learning introduction to the financial markets to earn a Bloomberg Market Concepts Certificate and to begin working on our Bloomberg terminals, the industry standard for investment research, analysis, and management.
- *Distinctive, real-world learning experience* prepares you to sit for Series 7 and for Life, Accident, and Health state insurance exams. You'll also be prepared to take the *Certified Financial Planner® (CFP) exam* right after graduation.

SAVANAH MILES '19

Candidate for CFP® certification
 Investment Consulting Services Associate
 Andersen Consulting
 Greater Boston Area



MAJOR: Financial Services with an Economics Concentration
HOMETOWN: Milford, NH
PATH: Co-founder of Smart Women in Finance; Resident Assistant; Student Ambassador; Member, Honors Program Elite, Omicron Delta Epsilon, Omicron Delta Kappa Honor Society, Beta Gamma Sigma International Business Honor Society, Bryant Senior Advisory Council; Operations Intern, Mortgage Networking, Inc.; Financial Advisor Analyst Intern, Bank of America Merrill Lynch; Infrastructure Finance Analyst Intern, TD Bank; Research Analyst, Bryant's Office of Planning and Institutional Research.

"I wanted to go as big as possible in college. I wanted to do amazing internships, study overseas, and be prepared for all of the amazing opportunities open to me. Bryant helped me do all of that."

INSPIRING FACULTY

Our esteemed Financial Services faculty include award-winning educators and mentors who have had success in the fields where they teach and in research. They combine the latest theory with direct experience. These caring and supportive professors get to know you as an individual in our close-knit, student-centered community. You'll acquire knowledge while developing confidence, a global perspective, and skills highly valued by employers and graduate schools.

THE FINANCIAL SERVICES FACULTY INCLUDES:

- A senior portfolio manager and CFP professional for a large wealth management firm
- An estate planning attorney and CFP professional in private practice
- A former vice president at two private banks
- A wealth and investment consultant in industry and private practice
- An actuarial expert in the retirement and pension industry

The CFP program at Bryant is one of the most unique opportunities for financial services undergraduate students. I was able to learn about the different areas of knowledge a CFP professional would have from estate planning to financial advising. Having completed the program I was eligible to sit for the exam after graduation. In a few years I will be able to hold the CFP designation, which is one of the most highly coveted designations in the financial industry.

ERIC MAURICIO '19

Assistant Vice President
Financial Solutions Advisor
Merrill Lynch
East Providence, RI

Among Our Distinguished Faculty:



MARA L. DERDERIAN '93, CFP

Lecturer, Finance
Director of Financial Planning Program

- Certified Financial Planner
- Educating Bryant students since 2009
- Former VP at HSBC Bank and Citi Private Bank
- Board Member of the Financial Planning Association of RI

TREVOR LYNE '20

Assistant to Financial Advisors
Pioneer Financial Group
Warwick, RI



MAJOR: Financial Services: Financial Planning Track

MINORS: Economics; Entrepreneurship

HOMETOWN: Feeding Hills, MA

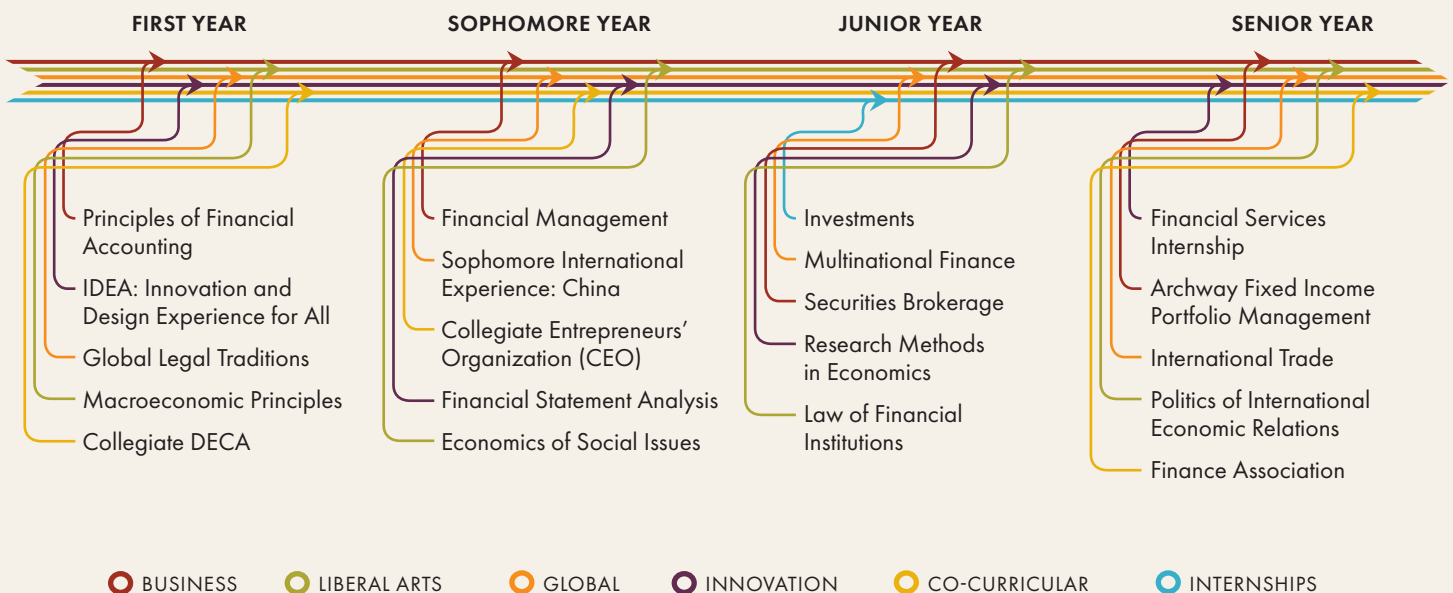
PATH: Member, Bryant's Division I Soccer Team; group leader in creating a business plan and product to solve irrigation problem in the United Arab Emirates; team leader for service learning project for local nonprofit; President of Operations for Management Production Game Group; Special Olympics CT and RI Volunteer; Gloria Gemma Flames of Hope Volunteer; two-time recipient, Boulet Award for Academic Achievement.

"I chose Bryant's Financial Services program for its unique Financial Planning Track. Completing this program, you meet the educational requirements to sit for the Certified Financial Planning (CFP) exam, which really puts you ahead in the industry. I am grateful to Professor Derderian and this program for teaching through real-world application and providing me with everything I needed to become a financial advisor!"

DESIGNED FOR YOUR SUCCESS

Bryant's innovative educational experience is focused on one central objective – preparing you for success. Bryant is recognized nationally for integrating business and the arts and sciences to provide students with a powerful combination of highly marketable skills. With a strong emphasis on experiential learning, your Bryant education will include opportunities for internships, consulting, participation in national conferences and competitions, social entrepreneurship, and study abroad. Bryant's inspiring and purposeful student life is designed to enhance your learning and real-world credentials.

Here's an abbreviated sample path to success:



ERIC MAURICIO '19

Assistant Vice President
Financial Solutions Advisor
Merrill Lynch
East Providence, RI



MAJOR: Financial Services

MINOR: Communication

HOMETOWN: Fall River, MA

PATH: Member, Finance Association, Campus Ministry; Student Ambassador; Resident Assistant; member, Omicron Delta Kappa national leadership honor society; Bank of America/Merrill Lynch Advisor Development Program Analyst; BankNewport Residential Lending Intern; Bloomberg Market Concepts certification; Envestnet Institute on Campus.

“Bryant’s Financial Services program allowed me to enter the career of my dreams. The variety of coursework ensures that students develop a full understanding of financial planning. Bryant’s program truly stands out, as it’s also a CFP board-certified program that allows students who pass the coursework to sit for the CFP exam after graduation. That helped me stand out to employers for internships and full-time job interviews.”



BRYANT FINANCIAL SERVICES GRADUATES ARE IN DEMAND

In business, government agencies, and nonprofit organizations including:

- > AMERIPRISE FINANCIAL
- > BANK OF AMERICA MERRILL LYNCH
- > CITIZENS COMMERCIAL BANKING
- > DELL EMC
- > FIDELITY INVESTMENTS
- > FINANCIAL INDEPENDENCE LLC
- > JOHN HANCOCK INVESTMENTS
- > LIBERTY MUTUAL
- > MASS MUTUAL
- > MERRILL EDGE
- > NORTHWESTERN MUTUAL
- > PIONEER FINANCIAL GROUP
- > PRATT & WHITNEY
- > RAYTHEON
- > RSM US LLP
- > STATE STREET
- > TRAVELERS
- > VOYA INVESTMENT MANAGEMENT

In leading graduate programs including:

- > Boston College
 - > Bryant University
 - > Georgetown University
 - > Johns Hopkins Bloomberg School of Public Health
 - > University of Chicago Booth School of Business
 - > Wake Forest University School of Law
 - > Harvard University
 - > University of Tampa
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WHAT SETS BRYANT'S PROGRAM **APART?**

1 *The Archway Investment Fund*

- Unique program featuring an Equity Fund Track and a Fixed Income Track that provide you with distinctive, real-world experience in analysis and portfolio management.
- Founded more than a decade ago with \$200,000 from Bryant's Board of Trustees, the portfolio – managed entirely by students – is valued at \$2.1 million. The Equity Fund is \$1.5 million and the Fixed Income Fund is valued at \$600,000.
- Attend professional conferences, including the International G.A.M.E. forum, in which Bryant has placed first, and hear from leading industry experts.

2 *The C.V. Starr Financial Markets Center*

- Access real-time news and data transferred by live feeds through FactSet and Bloomberg, financial trading systems used by some of the largest financial organizations in the world.
- Earn Bloomberg Market Concepts certification and use Bloomberg terminals, a dozen of which are available on the University's simulated trading floor.

3 *Beyond the Classroom*

- Explore industries through guest speakers, site visits, and collegiate competitions as well as through established student organizations including the Finance Association, Smart Women in Finance, and the Financial Inclusion Society.
- Engage with the Bryant Wall Street Council, a network of high-powered alumni, parents, and friends of Bryant who are leaders in banking, brokerage, finance, investments, and other financial services fields.

4 *Prestigious Industry Partnerships and Designations*

- Enroll in a Registered Program with the Certified Financial Planning Board of Standards (CFP designation) – satisfy the rigorous educational requirements of the CFP designation and be eligible to sit for the CFP exam upon graduation.
- Partnerships include: Certified Financial Analyst Society (CFA designation); Financial Planning Association (FPA); SPARK Institute; University Partnership with Bloomberg; and University Partnership with Rhode Island Bankers' Association.

To learn more about Financial Services or other programs at Bryant, please contact:
Office of Admission • (401) 232-6100 • (800) 622-7001 • admission@bryant.edu