



2025 FMA Finance Leaders' Conference

Agenda (Draft)

27 – 28 February 2025
Baruch College | New York, NY
Baruch College, Room 14-220

Thursday, 27 February 2025

8:00 AM

Registration

8:50 AM

Welcome

Karen Ann Craig, Eastern Michigan University
Chair, Student Chapter Committee

9:00 AM – 10:15 AM

Investment Analysis Competition

Sponsored by Wall Street Prep

10:15 AM – 11:30 AM

Keynote Speaker

[Michael Piwowar](#), Milken Institute

11:45 AM – 12:45 PM

Market Outlook

[Jill Malandrino](#), NASDAQ

[Sam Stovall](#), CFRA

12:45 PM – 2:00 PM

Luncheon (offsite - on your own)

2:00 PM – 2:55 PM

Real Estate

[Jariel Bortnick](#), Quad Property Group

[Andrew Piekarski](#), AXA Investment Managers

3:10 PM – 4:05 PM

Traditional Finance Careers

[Alexanderia Kallon](#), S&P Global

[Carla Nunes](#), Kroll

[Nogje Udevbulu](#), Blackrock

4:10 PM – 5:00 PM

Certifications

CFA – [Rob Langrick](#), CFA Institute

CFP – [Elizabeth Miller](#), Summit Place Financial Advisors

FPAC – [Jermaine Stanislaus](#), Bloomberg

5:00 PM – 6:00 PM

Networking Reception & Competition Poster Display

Friday, 28 February 2025

8:15 AM

Faculty Advisor Roundtable Discussion (Rm 14-285)

Chapter President Roundtable Discussion (Rm 14-280)

9:15 AM – 10:15 AM

Work/Life/Mental Health Balance

Alex Kivali, UBS

[Fatim Lelenta](#), NYU Stern

10:30 AM – 11:30 AM

Beyond Wall Street Careers

[William Hooper](#), Bank of America

[Geeta Kapadia](#), Fordham University

[Valerie White](#), LISC NY

11:45 AM – 12:45 PM

Finance & AI

[Yuyu Fan](#), Alliance Bernstein

[Matthieu Hafemeister](#), Concourse

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CFA Institute

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Association for Financial Professionals

Megan Ladd, Bryan Lapidus

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ASSOCIATION FOR
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AFP is partnering with FMA to equip students with hands-on financial and business analysis skills through the [University Partners Program \(UPP\)](#), which brings professional-level education to currently enrolled students. UPP participants will stand out in a competitive job market, be attractive to employers, and ready for work on day one.

The program complements your college curricula with AFP's online educational platforms and allows you to sit for AFP's exams -- all at a discounted rate. Participants who complete and pass the training modules will receive a badge of recognition from FMA for their knowledge and commitment to FP&A or Treasury. Those who sit for, and pass, the exams will receive the FPAC-Provisional or CTP-Provisional designation, signifying they understand the professional content qualifications and are completing the required years of experience to be fully certified.

CFA Institute

*Rob Langrick, Michelle DeMarco, Julia Orlich,
Brittany Morasse, LaKisha DeBiase, James Adams*



CFA Institute

CFA Institute is a global association of investment professionals committed to promoting the highest standards of ethics, education, and professional excellence in the finance industry. CFA Institute is recognized as a pinnacle for professional development in investment management. For over 75 years, it has fostered a community dedicated to delivering better investor outcomes and contributing positively to society.

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*Student pricing launches March 17, 2025

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UWorld Accounting
Nicholas Mihalik, Sarah Shepard



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