

FEBRUARY 2024

# UNDERGRADUATE WOMEN'S INVESTMENT NETWORK

News, program updates, student spotlights,  
mentorship program, & much more!

## A Note from the Founder

Shannon O'Mara, CFA, Credit Research  
Associate Director & Founder of UWIN

I am humbled that ten years have passed since the UWIN program officially launched and am more excited as we embark on the year of 2024.

I was recently reflecting on my meeting in 2015 with our CEO, Kevin Charleston, to discuss the need and my vision for the Undergraduate Women's Investment Network. Back then, I pitched Kevin on the many benefits of this program: to inspire undergraduates who are underrepresented in our industry and at our firm, to develop talent by providing mentorship, professional development and technical skills needed to succeed in this business, and to recruit these individuals to help us build a pipeline of diverse talent. My final point of the pitch was not a strong one on which to end and seal the deal. Specifically, I let Kevin know these efforts would not benefit us on day one or year one or even year two! Rather, it would take time to bear the fruits of this labor, given that we would be working with undergraduate students. We agreed we needed to do something which would hopefully benefit the greater good of the industry and eventually Loomis Sayles.

MENTOR.  
INSPIRE.  
WIN.



Undergraduate Women's  
Investment Network

I am thrilled that we are now enjoying the fruits of our labor. It's not quite a harvest yet, but the seeds are blooming and the forecast looks bright. We are now 250 women strong over the first nine years of the UWIN program where we have stretched our wings to include 22 schools in metro Boston, western Massachusetts, Rhode Island, Connecticut, and the newest addition, New Hampshire. Our program is somewhat limited by geography, but I'll never say no to a student who can travel to our Boston office a few times throughout the school year to participate in our workshops. Additionally, ten participants from the UWIN program are now employed by Loomis Sayles with another three starting in the Associate Development Program after their graduation this year.

You can learn about the internships, full time roles and promotions of some of the UWIN alums in the Good News section of this newsletter. I'm also sharing the sentiments from a couple of recent participants in the program. Their perspectives perfectly sum up the mission of the UWIN program:

*"I wanted to express how thankful I am to be part of the UWIN program at Loomis. I have learned so much and made so many connections that I know will stay with me even after the semester ends. I think this internship is extremely unique in its emphasis on empowering young women in the investment management space and really sets Loomis apart from other firms."* - UWIN Intern 2023-24

*"The UWIN program has truly been a life-changing program that has positively impacted my career trajectory in ways I cannot even put into words. From mentoring and connecting with professionals, to mastering essential industry skills, all of it has helped me grow as a rising professional in the industry."* - UWIN Intern 2023-24

With the dedication of the UWIN team - see the leadership team on page 18 to learn more about these inspiring teammates - and the support of dozens and dozens of colleagues and our senior management, we are gearing up for the 10th year of the UWIN program where we remain laser-focused on our mission to inspire, develop and recruit those who are underrepresented in the investment management industry. If you'd like to connect to learn more or to get involved, I welcome a conversation.



**Wishing you a prosperous 2024,**  
*Shannon*



## UWIN HITS A MILESTONE!!

The UWIN program was created in 2015 with our first cohort of 18 pioneering students from Bentley University who trusted our vision in our pilot program. After widespread positive feedback from students, we expanded to include UMass Boston for the next few years until we opened the program to all New England area undergraduates.

We embark on recruiting for our 10th year of the program – the 2024-2025 class – in February 2024! Help us spread the word for our information session on 20 February 2024 at 4:00pm.

[Click here to register.](#) Applications are due on 10 March 2024 via [the Loomis Sayles careers website.](#)



# Meet the Class of 2023-2024

UNDERGRADUATE WOMEN'S INVESTMENT NETWORK





# Student Spotlight

## ADA NYSTROM

**UWIN PROGRAM:** INTERNSHIP & MENTORSHIP 2023-2024

**SCHOOL:** UNIVERSITY OF MASSACHUSETTS AMHERST,  
CLASS OF 2026

**MAJORS:** FINANCE

**MENTOR:** JACK CELATA, SENIOR HIGH YIELD TRADER

**INTERNSHIP ROTATION #1:** PRIVATE CREDIT GROUP



Ada spent her fall semester of 2023 with the Private Credit Group (PCG), a newly formed team led by Chris Gudmastad, Greg Ward and Michael Meyer focused on originating, underwriting, and executing private credit deals, specifically in the private placement and specialty financing space. Under the guidance of Greg Ward and Chris Morgen, Ada designed a project focused on ESG in the private markets with the goal of providing insight into the initiatives that other private credit managers are taking to incorporate ESG into their investment strategies.

Through shadowing analysts and the team's leadership, Ada gained exposure to the deal process and engaged in stimulating discussions on weekly team calls. Her goals for the internship were to form meaningful relationships with each member of her team and to learn more about the investment management industry. Ada's favorite aspects of the internship were the impactful conversations she had with esteemed investment professionals and the opportunity to learn about private credit, fixed income, and ESG integration.

In addition, Ada greatly benefited from the relationship she formed with her mentor, Jack Celata, who provided her with insightful career advice and strategies for learning about markets and fixed income through their bi-monthly calls. "My biggest takeaways from UWIN have been the connections I have made with investment professionals and my fellow mentees, and I would encourage anyone in this position to learn about the many different roles in finance and start building a network!"

Ada grew up in Western Massachusetts and went to a Chinese Immersion school where she learned Mandarin for seven years. At UMass, she is a junior equity research analyst for a selective, student-run investment fund, the Minutemen Equity Fund, and serves as Stock Pitch Chair for the Smart Woman Securities chapter. In her free time, she enjoys hiking, going on runs, playing piano, and listening to jazz.

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## Intern Manager Spotlight

### GREG WARD

Investment Director, Private Credit

### CHRIS GUDMASTAD, CFA

Portfolio Manager, Private Credit

**INTERN:** ADA NYSTROM

**UWIN PROGRAM:** INTERNSHIP & MENTORSHIP 2023-2024

**SCHOOL:** UNIVERSITY OF MASSACHUSETTS AMHERST,  
CLASS OF 2026

**MAJORS:** FINANCE

**MENTOR:** JACK CELATA, SENIOR HIGH YIELD TRADER

**INTERNSHIP ROTATION #1:** PRIVATE CREDIT GROUP



The Private Credit Group (PCG) was fortunate to participate in the UWIN program in 2023 and to have the opportunity to work with Ada Nystrom throughout her fall semester at UMass Amherst. We involved Ada in a wide variety of projects during her time with us but focused on involving her in the transaction underwriting process and understanding ESG in private credit, both areas Ada expressed a particular interest in. All of us on the PCG team were impressed with Ada's ability to quickly understand complex financial transactions and identify key issues and themes. Ada also completed and presented a research report on the state of ESG matters in the private credit market that was very thoughtfully done and provided valuable insights for the team.

Above all, Ada was a highly valued, if temporary, member of the PCG team who always came to discussions well prepared and ready to contribute to the discussion and was just a great person to work with. We all look forward to following her success in the years to come.

For the Private Credit team, participating in UWIN was a great experience and we look forward to staying engaged in this program as it evolves in the years ahead. We hope that Ada and her peers found it as rewarding as we did and that the experience will lead many of them to choose a career path in investment management when they complete their academic careers.

# Alumna Spotlight

## MARTINA JANKOVIC

GLOBAL BANKING AND MARKETING ANALYST

**UWIN PROGRAM:** INTERNSHIP AND MENTORSHIP  
2021-2022

**SCHOOL:** BABSON COLLEGE, WELLESLEY,  
CLASS OF 2023

**MAJOR:** FINANCE

**MENTOR:** LUIS CAJAMARCA, QUANTITATIVE  
ANALYST



I participated in the UWIN program at Loomis Sayles during my junior year of college. The internship was invaluable where it provided unique insight into the fixed income asset class and enhanced my credit research skills, which I now apply in my current role at Goldman Sachs. My first internship rotation was on the Disciplined Alpha team in Orinda. Lynne Royer and the rest of the team took the time out of their busy days to teach me concepts regarding the bond market, ESG framework, and portfolio analysis. The projects were based on developing skills that I can use to further develop my career. I developed proficiency in building models using Bloomberg Excel Add-in, with the strategic goal of constructing custom portfolio analysis. The second rotation was with the Credit Research team. Under my supervisor, Nicole Jackman, I participated in researching, analyzing, and recommending holdings for dedicated bank loan and high yield mandates.

I appreciated the guidance from my mentor, Luis Cajamarca, who played an important role in both my professional growth and the development of my career vision. In our mentor/mentee sessions, he challenged my views on career progression and assigned practical tasks that helped me better envision my professional path. Additionally, I am particularly grateful that this program connected me with my “unofficial” mentor, Jack Celata, a distinguished industry veteran. Jack’s counsel played a pivotal role in preparing me for my 2022 summer internship at Goldman Sachs, and I attribute a significant portion of my success in landing a full-time job offer at GS to his guidance.



### A REFLECTION FROM MARTINA ON HER EXPERIENCE

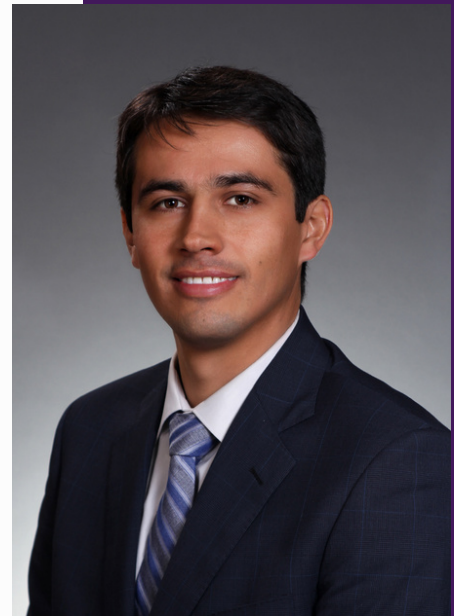
“UWIN connected me with mentors, both official and unofficial, that greatly contributed to the development of my career; from resume guidance and honing interviewing skills to developing “hard” skills that I utilize in my everyday work life. And the mentorship didn’t stop with the program. Till this day, I maintain regular communication with the people who were pivotal to my development and still utilize their expertise and guidance.”



# Mentor Spotlight

There is great value in connecting with soon-to-be young professionals, usually eager individuals who strive to succeed in a professional setting, but who more often than not, need just a bit of guidance. Having someone to be able to talk to about professional development in an honest yet safe setting is extremely helpful and is a great learning experience for both mentor and mentee. As a mentor there is a great sense of pride when you witness how much of a positive impact you can have in someone's career path. The UWIN program has been a very joyous experience, one that I hope I continue to enjoy for years to come. When done right, the mentor and mentee can really help each other in the never ending task of personal growth.

**Luis Cajamarca, PhD, Quantitative Analyst**



I have been so impressed by Loomis Sayles' ongoing investment in developing the next generation of asset management talent, and fostering programs that will help change the face of the industry to be more reflective of the diversity around us. UWIN is one of many such Loomis programs where I have been so inspired by the work we are doing and the opportunity to interact with up and coming talent. I have enjoyed sharing my own professional experiences with the broader UWIN participants and going deeper in one on one mentoring relationships – and learning so much from the fresh perspectives offered by the impressive up and coming talent in these programs. These interactions have proven so energizing to me personally. And, I love getting to see the direct impact we are having, fostering impressive and diverse talent to become the future of asset management.

**Susan Sieker, Chief Financial Officer**



It has been a privilege to be a UWIN mentor and member of the UWIN committee for the past several years. The caliber of talent and curiosity is always impressive. The number of graduates launching careers in finance is proof that we are all succeeding. When I think about the underrepresentation of women in our industry, I am proud that Loomis is an active part of the solution. I am always amazed at the growth in students from the beginning of the program to the end. From investment management knowledge to personal and professional confidence, it is often inspiring. To know that I have contributed to helping my mentee discover a passion and helped lay a foundation for future success is extremely rewarding.

**Marianne Winkelman, Director of Global Rates, EM & FX Trading**



# Inside a Mentorship

## As a mentee/mentor, why did you decide to be a part of the program?

**Jessica:** As I learned more about investments, I realized that there were other securities, apart from equities, that could be invested in. Thus, I became interested in learning more about the fixed income market. The reason why I decided to be a part of the mentorship program is because I saw an opportunity to learn more about this market through an industry professional. I also saw the program as an opportunity to sharpen my analysis skills and improve my understanding of market news. I can confidently say that this program has met my expectations, as I now have a much better understanding of fixed income concepts and an easier time applying what I've learned to my readings.

**Brian:** I've always enjoyed being a part of mentoring programs. They are a great way to interact with college students and young professionals. I clearly remember the uncertainty of a professional future while in college as well as the helpful advice I received from professors and mentors early on in my career. Talking through personal and professional interests, curriculum, career paths and investing are enjoyable conversations. I've always been surprised at how much focus undergraduate programs place on equities versus fixed income. Shedding some additional light on the fixed income markets can help open up additional career paths for those who may not have significant exposure to this industry in an undergraduate setting.

## What do you contribute to making this mentee/mentor relationship an enriching experience?

**Jessica:** I try to dedicate a few times a week to reading some basic concepts, as well as some market news, in order to share some insights with my mentor. Doing so, I am able to keep the conversation flowing and continue learning about key points that I might have missed through my readings. Additionally, I try to meet with Brian once a month to clear up any questions and confusion I may have. Throughout these meetings, I have the pleasure of receiving many suggestions from him, including career advice and learning to make the most of my college education.

**Brian:** I believe one of the best things about UWIN is the onus being on the mentee to set an agenda and drive the topic of conversation. That means a student can use this opportunity to take the discussion in any direction they want to. I have no set list of agenda items I need to get through during our interactions together. I'm happy to respond to whatever a mentee feels is the best way to use their time. Jessica and I have covered a wide variety of topics ranging from a broad overview of the fixed income landscape to calculation of yields to market specific news on companies such as Apple and General Motors. We've also chatted about curriculum likes and dislikes as well as what classes/skills may be important for the next generation of investors.



**JESSICA NOVOA**

UNIVERSITY OF MASSACHUSETTS AMHERST, CLASS  
OF 2025  
MENTORSHIP 2023-24



**BRIAN KENNEDY**

UWIN MENTOR  
PORTFOLIO MANAGER, FULL DISCRETION

## What do you advise future members?

**Jessica:** I suggest having good communication with your assigned mentor. Moreover, show curiosity and ask questions because that is how you will learn and grow professionally. I believe that this represents a great opportunity to develop leadership skills by showing initiative and dedication. In addition, network with other professionals from the firm and ask for their insights on their job function to get an idea if you foresee yourself doing that specific job as well.

**Brian:** Be prepared and organized when you commit to this interaction. Not because that's what I and other mentors expect, but because the more organized you are, the more questions you have ready, the more topics you want to discuss, the more you'll get out of this relationship. Be curious and challenge your mentor. Jessica has sent me a number of emails with questions based on market news she's read about. It's obvious to me that she is curious and wants to learn. Use this opportunity to ask about areas you want to know more about. We as mentors are here to help, take advantage of the opportunity!

## Inside a Mentorship, continued

### As a mentee, what is your biggest takeaway from this experience?

**Jessica:** My biggest takeaway is knowing that I have support from my mentor to grow professionally; by being curious and asking questions, I continue to learn more about the specifics of the investment industry. For example, I now have a better understanding of the inverse relationship between price and yield. Also, participating in the monthly workshops has been a fruitful experience. I've been able to build on relevant skills as well as network with those in my cohort. I am looking forward to participating in the trading event; I feel that this is an example of a job function that is not really spoken about, other than what is shown in the movies.

### As a mentor, what do you enjoy the most about this program?

**Brian:** This is a rewarding experience that allows me to learn through my meetings with Jessica and other mentees. From the mentor perspective, interacting with future professionals like Jessica gives me the opportunity to see how this new generation thinks, what they value and teaches me where some of my blind spots are. Jessica has continued to stay committed to this opportunity and has challenged me with her questions and curiosity. Obviously, helping pass on my experiences and in a small way, guide students as they explore future career paths, is gratifying and fun.

### What have you learned from your mentor/mentee?

**Jessica:** I learned a lot of technical concepts, focusing mostly on fixed income. Specifically, I learned basic terminology as well as gained insight on how different risks affect the market. I am still in the process of learning the different bonds available to trade. I also learned about the diverse career paths in the industry, further contributing to expanding my scope beyond equity research. In addition to these monthly interactions, I've been able improve my analysis skills by reading news articles. I learned how to ask better questions as well as look further into the details to write-up my own interpretation of them. What I look forward to in the coming months is to improve on my networking skills by interacting with others in the firm.

**Brian:** I've really enjoyed my interactions with Jessica. This has been an enjoyable and rewarding experience. It has been a good confirmation for me that mentees who are prepared, curious and have ambition can take a lot from this program and use what they have learned here not only in an academic setting but in a professional one after college, as well.

“

#### JESSICA NOVOA

Thanks to this program and Brian, this experience has motivated me to continue sharpening my skills and better prepare myself for the industry.

“

#### BRIAN KENNEDY

Quite frankly, I'm learning from many of this next generation even as I try to communicate my own experiences, successes and failures.



# What's New at Loomis Sayles?

Last year, the firm communicated our IDEALS -- the core values of who we aspire to be as employees, colleagues and trustworthy partners to our clients and global stakeholders -- and celebrated them in April during our inaugural IDEALS week. We draw upon these values in service of our mission, vision and goals:

## **Inclusive & Diverse**

We value the lived experiences and alternative viewpoints of all colleagues. An inclusive and equitable workplace that reflects the diverse communities in which we work and live fosters innovation, creative thinking and best-of-industry solutions that help us exceed client expectations.

## **Dedicated to Teamwork**

We believe respect, partnership and collaboration across teams and departments makes us better. We support and share success with our teammates and colleagues and aim to inspire the people around us to be their best.

## **Excellent**

We hold ourselves to the highest standards, individually and for the sake of our clients. Every employee brings unique expertise and skills to our organization. Our collective success is dependent on the development and retention of our talented individuals and we respect and honor their contributions to our shared purpose.

## **Accountable**

We honor the commitments we make to our clients, teammates, colleagues and selves. We do not make excuses but instead take responsibility for our actions. We are honest, transparent and always seeking opportunities to be better.

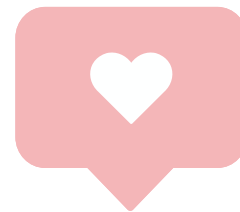
## **Leaders**

We help our colleagues and ourselves by modeling behavior that inspires the people around us, including respect, humility, gratitude, empathy and encouragement.

## **Solutions-Oriented**

We are critical thinkers and passionate problem solvers. We assess issues and identify opportunities to deliver innovative solutions to our clients and colleagues.

NEW



## UWIN Instagram

CHECK OUT SOME OF THE MOST RECENT INSTAGRAM POSTS FROM OUR NEWLY REVAMPED ACCOUNT!

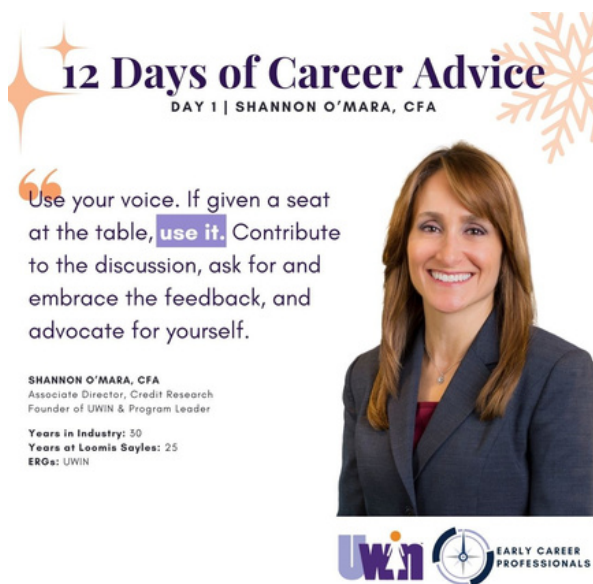
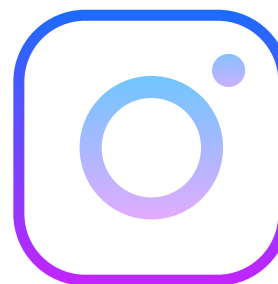


LIKE WHAT YOU SEE?  
WE WANT TO FEATURE YOU!

CHECK YOUR EMAILS IN THE COMING WEEKS FOR SURVEYS ON HOW TO BE INCLUDED!



@UWIN\_LOOMISSAYLES



# Inspiring Speaker Series

## Rosina Racioppi

CEO of WOMEN Unlimited

Attendee: "This event was extremely beneficial and provided a lot of advice in terms of asking for feedback and networking opportunities"

Rosina: "Your network has a direct impact on how you gain new ideas, get advice and information, acquire skills and resources, and learn about opportunities"

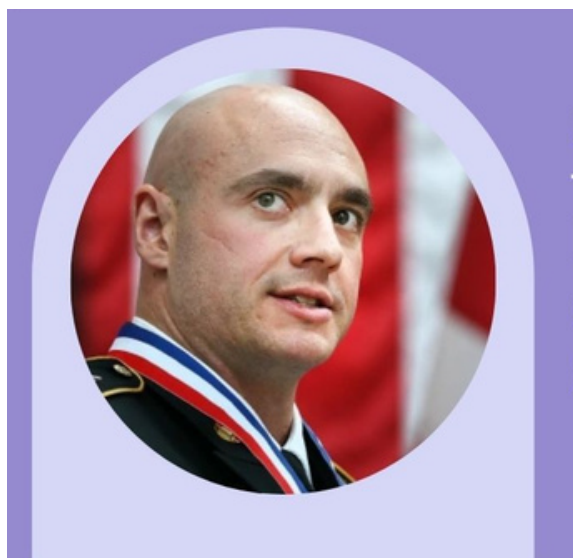


## Nick Lavery

CEO of Precision Components and a Green Beret: the only above-the-knee amputee in active duty

Attendee: "I feel so inspired. Nick synthesized these thoughts so extremely well and had such amazing energy that I think the inspiration will stay with me for a very long time"

Nick: "We learn by failing, and you will get better every time you lose."

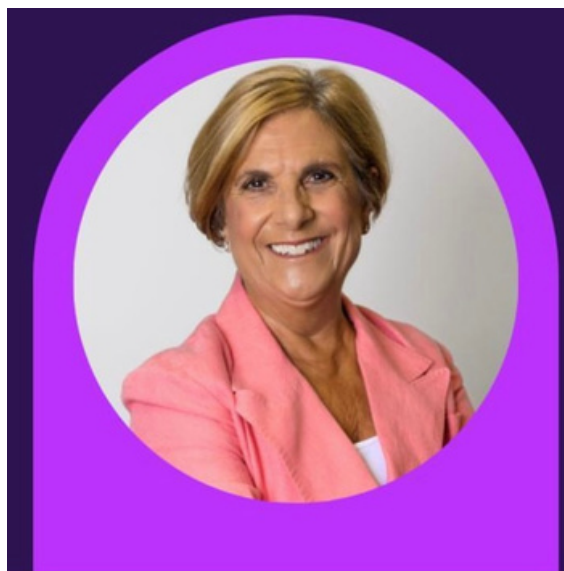


## Nancy Frates

ALS Advocate; Mother of Peter Frates, creator of the Ice Bucket Challenge

Attendee: "Nancy's delivery of such a difficult and emotional topic was amazing. She is so strong."

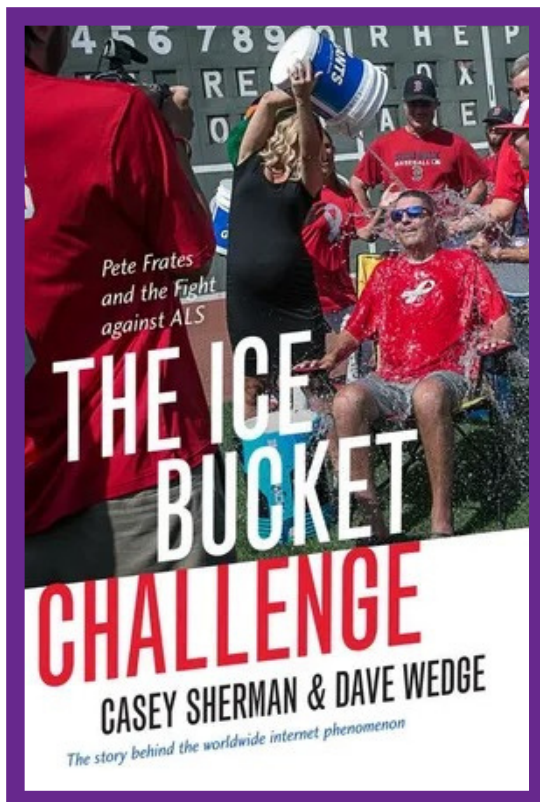
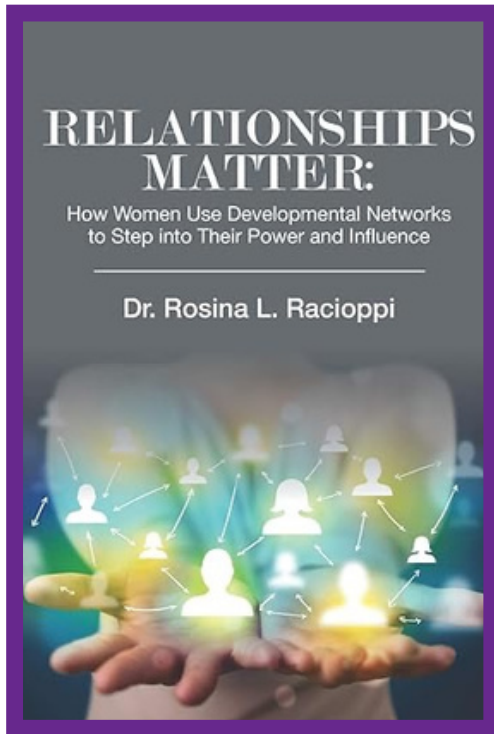
Nancy: "In regards to facing adversity, Pete said 'I'm not going to ask why me?, I'm not going to wallow in what just happened.' The 3 P's of Pete are be positive, purposeful, and productive."





# ICYMI.....

**HERE ARE SOME  
BOOKS FROM THE  
SPEAKERS YOU CAN  
FIND YOUR OWN INSPO  
FROM!**



# Good News

## JOB, INTERNSHIPS, CHANGES & LIFE EVENTS!

### Graduates Launching Careers in 2024

- Caroline Barbieri - Loomis Sayles
- Jazlyn Barnaby - Loomis Sayles
- Emma Caruso - Macquaire Bank
- Makenzie Gorman - Goldman Sachs
- Marie Maher - Fidelity Investments
- Sarah Monsini - Bryant University MBA Program
- Sharon Park - Piper Sandler
- Vandana Patel - Loomis Sayles
- Mallika Shankar - Cantor Fitzgerald
- Elizabeth Spalla - Goldman Sachs

### Incoming Summer 2024 Internships

- Inez Baxter - Fidelity Investments
- Sabrina Frusco - MUFG
- Lily Gofman - Xtellus Capital Partners
- Talia Hanley - Barclays
- Allison Koziarz - Wells Fargo
- Casey Le - KPMG
- Annabel Lowe - PSG Equity
- Isabela McMahon - Girls Who Invest
- Ada Nystrom - Loomis Sayles, Girls Who Invest
- Aastha Rajani - Fidelity Investments
- Emily Zhu - Guggenheim Partners



### Mentee 2022-2023

My career isn't going to be a straight line, and that's OK. Having a big and supportive network is important.



### Mentee 2022-23

I left the final workshop feeling empowered and excited to be entering the world of finance.

If you have good news to share, we'd love to hear it!  
Email us at [UWINinfo@loomissayles.com](mailto:UWINinfo@loomissayles.com)

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# Good News

## JOBS, INTERNSHIPS, CHANGES & LIFE EVENTS!

### Alumni Updates

- **Courtney (Gregory) Allaire** - I have some very good news— in May I finished my graduate degree at Bentley and received my MBA, then best of all, at the end of July I welcomed my son, Hendrick, into the world!
- **Inez Baxter** - Next semester, I will be a senior analyst in the Minutemen Fixed Income Fund (MFIF); an on-campus credit fund at UMass Amherst that focus on credit research (particularly high-yield bonds).
- **Bridget Clark** - I completed my MBA program at Bentley University in December! It was challenging but rewarding and I'm thankful work supported me while I completed this part time program. I'm still working at Athena Health on their corporate FP&A team and really enjoy it.
- **Talia (Vicente) Cyr** - I got married on September 3rd. I also passed my SIE exam in April of 2023 and recently passed my Series 65 exam in November to make me eligible to be an investment advisor representative and transition away from the analyst and paraplanner role I was doing after graduation.
- **Shaelyn Fitzgerald** - I started full time with Global Equity Strategies at Loomis Sayles as a research associate this past fall.
- **Sabrina Frusco** - I was accepted into Trinity College Dublin to study abroad this semester and am so excited for all that is to come!
- **Julie Hagopian** - I finally passed my Level 3 exam and received my CFA charter in November this year!
- **Talia Hanley** - I was recently elected as Co-Merchandise Chair to help design all the merchandise and associated swag for Lowell House at Harvard College, which houses 400+ undergrad students. I am a founding member of Collegium Underground A Cappella Group; helping revive the A Capella subset of one of Harvard's three Choruses.
- **Julia Kraplin** - I recently started a new position at JP Morgan in Washington and passed my SIE.
- **Casey Le** - I am a part of the Girls Who Invest 2024 cohort for their Online Intensive Program!
- **Deanna Leung** - I just finished up two years of living and working in South Korea under the Fulbright Scholarship where I was an English teaching assistant (ETA) for one year in a rural South Korean town where I taught English to 10th and 11th graders. I liked it so much that I decided to do another year in Korea, but this time as a program coordinator in the Fulbright Korea office. I helped administer the ETA Program and got to live in the big capital of Seoul. Throughout the two years, my Korean improved a lot since I started learning Korean on my own in 2020. I'm now back in Boston, refreshed for my next journey.
- **Ada Nystrom** - Over Summer 2024, I will take part in the Girls Who Invest Online Intensive Program and complete financial courses from Wharton Online, Wall Street Prep, and the CFA Institute. I was also recently appointed Stock Pitch Chair for the UMass Amherst Smart Women Securities Chapter.
- **Aastha Rajini** - I was offered a position as a Junior Analyst at the Minutemen Alternative Investment Fund. Furthermore, I attended the Morgan Stanley Investment Management Career Discovery Day and the Audax Group Women in Private Debt Forum this past semester.
- **Emily Richard** - I joined J.P. Morgan Private Bank in Boston as a Vice President and Investment Specialist where my team and I offer catered wealth management strategies for some of the most prominent individuals in the Boston area. My goal is to alleviate the stress of financial decision making as clients seek to build sustainable legacies.

If you have good news to share, we'd love to hear it!  
Email us at [UWINinfo@loomissayles.com](mailto:UWINinfo@loomissayles.com).

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# Good News

## FROM THE UWIN TEAM!

- **Catherine Ferri (UWIN Mentee Advisor)** was promoted to Senior Associate in Credit Research.



- **Tricia Keefe (UWIN Mentorship Program Coordinator)** was promoted to Head of Corporate Services where she has global responsibility for the firm's real estate and space planning, as well as the General Services team. She recently welcomed a new family member, a chocolate lab puppy named Benny.



- **Kristen Moldovan (UWIN Internship Program Coordinator)** was promoted to Senior Associate in Credit Research.



“

UWIN will open numerous doors for both your professional advancement and personal development.

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The program answers so many questions about what it is like to have a career in finance and which role you see yourself thriving in.

If you have good news to share, we'd love to hear it!  
Email us at [UWINinfo@loomissayles.com](mailto:UWINinfo@loomissayles.com).

# Apply Now for 2024-2025

In order to be considered for the UWIN program, you must provide an application, a resume, cover letter, and an unofficial transcript. Applications are available on the careers section of the Loomis Sayles website beginning February 1, 2024.

## RECRUITING DATES

**February 1, 2024:** Application opens on the Loomis Sayles careers website

**February 20, 2024:** UWIN Information Session (<https://careersloomissayles.com>)

**March 8, 2024:** Applications due

**March 18 - 29, 2024:** Candidate interviews

**April 15, 2024:** Decisions communicated

### CONTACT US

[UWININFO@LOOMISSAYLES.COM](mailto:UWININFO@LOOMISSAYLES.COM)

### VISIT OUR WEBSITE

[WWW.LOOMISSAYLES.COM](http://WWW.LOOMISSAYLES.COM)



[@UWIN\\_loomissayles](https://www.instagram.com/@UWIN_loomissayles)

## UWIN LEADERSHIP

Shannon O'Mara, CFA, Credit Research Associate Director – Founder of UWIN and Program Leader

Andrea DiCenso, Portfolio Manager & Strategist – UWIN Advisor

Erika Fallon, Administrative Supervisor & Senior Administrative Assistant – UWIN Events Coordinator

Catherine Ferri, Senior Research Associate – UWIN Mentee Advisor

Steve Hoppe, Senior Fixed Income Trader – UWIN Mentor Advisor

Tricia Keefe, Head of Corporate Services – UWIN Mentorship Program Coordinator

Kristy Keenan, Associate Investment Director – UWIN Internship Program Coordinator

Kristen Moldovan, Senior Credit Research Associate – UWIN Internship Program Coordinator

Marissa Neill, HR Business Partner – UWIN Marketing & Recruiting

Marianne Winkelman, Director of Global Bond, EM & FX Trading – UWIN Advisor



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