

A LOOMIS, SAYLES & COMPANY

# UNDERGRADUATE WOMEN'S INVESTMENT NETWORK

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

## LETTER FROM THE FOUNDER

**Shannon O'Mara**, CFA, Founder of UWIN  
Co-Director of Credit Research

**Here's to a decade of inspiring, developing and recruiting talent!** UWIN has grown from 18 students from one school to 300 students across 29 schools today. Our impressive alumni have made significant inroads into the investment management industry, including the 14 who work here at Loomis Sayles.

Thinking back to 2015 when UWIN was piloting its first year at Bentley University, I never imagined the significant impact the program would have on our participants, colleagues, and Loomis Sayles. The program's success is directly reflected in the hundreds of students who've participated in the program with many alums finding internships and their first jobs in the industry. In fact, in addition to the 14 UWIN alums who are now colleagues at Loomis Sayles, I am excited to welcome another three to the firm in July when they join our Associate Development Program. Check out the "Good News" section to learn where participants are landing opportunities.

This is part of a recent email I received from a UWIN alum that captures the value of the program and its resources:

**"I can confidently say that the impact Loomis Sayles has had on my life is immeasurable. The network of individuals who put time and effort into the UWIN program has instilled so much confidence in me, and I truly believe that this program has played a huge role in the way I present myself in professional environments, leading me to success. I truly believe that the UWIN program gave me the confidence to, in a professional setting, be bold enough to make connections that others were too scared to make, and tenacious enough to go for what I wanted day after day no matter what. Thank you for helping me learn how to hold my own and stand out in a positive way."**

I receive emails and feedback throughout the year from participants who echo these sentiments. It's gratifying to see the tangible impact the program is having on career choices and professional development. Mentorship and intentional development are key tenets of the UWIN program and key to our success.

Additionally, the UWIN program has had a positive impact on the culture of Loomis Sayles as we are guided by our IDEALS, the core values of who we aspire to be as employees, colleagues, and trustworthy partners to our clients and global stakeholders. These include Inclusive & Diverse, Dedicated to Teamwork, Excellence, Accountable, Leaders and Solutions Oriented. Check out what some of our mentors and intern managers are sharing about their experiences in this newsletter. Notably, my colleagues who participate in the UWIN program exemplify the "D" or "Dedicated to Teamwork" pillar of IDEALS in that they aim to inspire people to be their best through respect, partnership and collaboration. They also embody the "L" or "Leaders" pillar of IDEALS in that they model behavior and encourage people around them.

I'm grateful to our senior management for their continued support of UWIN which has developed into a key talent acquisition program for the firm in collaboration with our successful Associate Development Program, now in its second year. I'm grateful to every colleague who says yes to a request from the UWIN team including mentorships, internships, panel discussions, presentations, informational meetings, and mock interviewing. I'm also thankful for our university and college partners who support the program locally on campus. We couldn't be nearly as successful without this community and intentional effort. Lastly, I'm beyond grateful to the UWIN team who fuels the success of the program. Check out these talented individuals at the end of this newsletter.

If you'd like to connect to learn more or get involved, I welcome a conversation. Cheers to another 10 years of inspiring, developing and recruiting the next generation of talent!



**Wishing you a prosperous 2025,**  
*Shannon*

# UWIN HITS A MILESTONE!

## CELEBRATING 10 YEARS OF INSPIRATION & DEVELOPMENT

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 **all schools in the United States!**

# 10

YEARS OF HELPING UNDERGRADUATES SUCCEED

# 300+

INDIVIDUALS HAVE PARTICIPATED IN UWIN

# 29

COLLEGE & UNIVERSITY PARTNERS

# 17

HIRED FULL-TIME AT LOOMIS SAYLES



INSPIRE. DEVELOP. **RECRUIT.**

## 2025 RECRUITING DETAILS

This February, we embark on recruiting for our 11th year of the program! Help us spread the word for our information session on:

**19 February 2025 at 4:00pm.**

**[Click here to register.](#)**

Applications are due on 7 March 2025 via [the Loomis Sayles careers website.](#)

*We strongly encourage all people who are committed to advancing the UWIN mission to apply, regardless of gender or gender identity.*

# Meet the Class of 2024-2025

UNDERGRADUATE WOMEN'S INVESTMENT NETWORK



# WHAT'S NEW?

## GO BIG OR GO HOME!

### **The UWIN program has expanded to all schools in the United States!**

With an annual capacity of 50 students, we aim to be as inclusive as possible. We are happy to offer limited financial support for commuting expenses to tOFC for conferences and workshops. Our alums now represent a collection of 29 schools across the US.

### **NEW DEVELOPMENT SESSIONS!**

The UWIN program added two new development sessions this year: a volunteer activity and making the most of your internship or first job.

#### **Volunteering with Love for Our Elders**

We partnered with our Community Investments to facilitate an activity with a terrific organization called Love Our Elders, whose mission is to alleviate social isolation among older adults through handwritten letters and intergenerational connections. It was a fun and easy way to provide a valued elder with some connection and a smile. One UWIN student shared "I loved that we had a volunteer opportunity built into this day's workshop! I believe giving back to your community is extremely important." Another shared "I enjoyed learning about the opportunity and how impactful it can be to our elderly community!" To learn more, check out their website:

[Letters – Love For Our Elders](#)

#### **Making the Most Out of Your Internship or First Role**

HR Coordinator Harika Diaz led an engaging discussion on best practices to set yourself up for success as you embark on your first professional experience. We discussed the need to be proactive and engaged in driving your own success, the value of seeking and embracing feedback, and the process of personal brand building. After attending, one UWIN student shared, "I found it really useful to hear about ways to perform better during the internship, especially since there were factors that I hadn't considered before. I found that there were a lot of tips that I could also take with me outside of an internship setting, such as actively asking for feedback."

Own the  
experience

Value  
Feedback

Brand  
Building

# Student Spotlight

Nathalia Succar spent her fall 2024 semester with the Credit Research department working with Co-Director, Shannon O'Mara and Senior Associate, Alex Greenberg. Under their guidance, she performed credit analysis, wrote a credit report, and presented her views on a building products company. She researched the industry, built and interpreted financial models, assessed the credit health of the company, and studied the relative valuation among the sector. She further developed her analytical, communication, and excel skills.

Coming into the UWIN program, Nathalia's goals were to expand her network, form strong relationships with the other interns, develop her understanding of financial markets, and advance her communication skills. Through this experience, she has learned three main lessons. The first lesson is to maintain transparency and strong communication with managers. The second is to ask questions and investigate when faced with a challenge. Third is the importance of forming relationships not only with managers but also with other co-workers and interns to foster a welcoming and supportive community where she can thrive. "It was an overall amazing experience that allowed me to grow tremendously through learning about Credit Research and forming professional relationships."

Nathalia is grateful for the support of her mentor, Colleen Jones. Through weekly meetings, they formed a strong relationship where they discussed the internship experience and expectations, professional interactions, and balancing school and work. "I truly appreciate our relationship and look forward to developing it further in my spring semester. The fact that Loomis Sayles has a diversified and inclusive environment that fosters a culture of entrepreneurialism, where all employees are empowered and encouraged to develop themselves and their ideas, is inspiring to me."

Nathalia is a second-year student at Bentley University where she is a member of the Women's Leadership Program and the Scholars of Finance. She is a student researcher in the Valente Program and a volunteer for the Tayo Skills School in Somaliland, a vocational school for women where they learn to support themselves and become agents of change. She continues to advocate for her home country of Haiti as a Worldview Ambassador. In her free time, she enjoys going on walks, reading books, journaling, running, and exploring new places.



## NATHALIA SUCCAR



**UWIN PROGRAM:** INTERNSHIP & MENTORSHIP 2024-2025

**SCHOOL:** BENTLEY UNIVERSITY

**CONCENTRATION:** ECONOMICS AND FINANCE WITH MINORS IN BUSINESS ADMINISTRATION & COMPUTER SCIENCE

**MENTOR:** COLLEEN JONES

**INTERNSHIP ROTATION #1:** CREDIT RESEARCH

**INTERNSHIP ROTATION #2:** SPECIALTY GROWTH STRATEGIES

# Manager Spotlight

2025 will mark the 5th year that I have hosted a UWIN intern. I consider myself lucky to have been a small part of each student's journey into the workforce. I take great pride in having offered hands-on-training and skill development as well as professional connections that have factored into some of the exciting roles they have landed. Working with UWIN interns has been a reminder of what I love about Credit Research.

UWIN interns have helped Credit Research by tackling projects that have stubbornly remained on the "to-do" list. They have the accounting, finance, and model building skills as well as enthusiasm and a fresh set of eyes that is so valuable in the investment industry. These projects help interns improve their company and industry knowledge and at times, even contribute to alpha generating portfolio transactions.

I encourage any colleague who has considered hosting potential interns to give it a try, especially if they have projects that need some attention. The intern part-time schedule lends itself perfectly to projects that can be divided into bite-sized tasks where both parties have time to digest and circle back. I encourage interns to use the experience to not only build technical skills but to also develop the soft skills that prepare you for workforce readiness. For anyone involved, it will be 10 weeks well spent!



## NICKY JACKMAN



**TITLE:** SENIOR CREDIT RESEARCH ANALYST

**UWIN PROGRAM:** INTERNSHIP 2024-2025

**DEPARTMENT:** CREDIT RESEARCH

# Mentor Spotlight

## NICOLE BALICH

### DIRECTOR OF PORTFOLIO IMPLEMENTATION

It has been a true privilege to serve as a UWIN mentor over the past several years. I am always amazed with the level of talent and ambition displayed by the rising professionals participating in this program. Having the opportunity to provide support and guidance for mentees as they navigate the transition from college into the professional world has proven to be a great source of inspiration for me personally. As the need for diversity within our industry continues to grow, I take great pride in knowing that Loomis Sayles takes a proactive role in developing the next generation of talent. I look forward to participating in the UWIN program for many years to come.



## JACK ROTONDI, CFA

### INVESTMENT ANALYST

I consider it a privilege to engage with young professionals who are eager to carve their paths in the finance industry. I continue to be amazed by the excellence and curiosity exhibited by mentees. As mentors, we have the chance to provide guidance and share insights in a supportive environment. Witnessing the progress and growth of mentees not only brings me a sense of pride but also highlights the impact of mentorship in shaping careers. The interactions and shared experiences have enriched my perspective and reinforced my commitment to helping the next generation of finance professionals. The mentorship program has been both fulfilling and educational, I seem to learn something new about my mentee and about myself each time we meet.

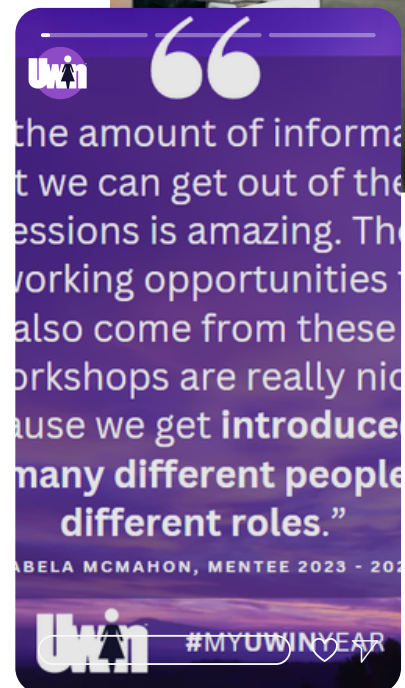




# UWIN INSTAGRAM

@UWIN\_LOOMISSAYLES

Follow us on instagram for program highlights, behind the scenes, participant spotlights & advice for students interested in the investment management industry.



# Alumni Spotlight

Meet some of the UWIN alums who launched their careers at Loomis Sayles! They are among 14 colleagues who participated in the UWIN program during their undergraduate experience. It's been terrific to see this cohort grow as a tangible measure of success of the program's mission to inspire, develop and RECRUIT! Loomis Sayles is so fortunate to have these talented colleagues at Loomis Sayles where they are directly contributing to the firm's success.

## CHANTAL CARACO

### SENIOR CLIENT PORTFOLIO ANALYST

UWIN PROGRAM: 2018-2019

SCHOOL: BENTLEY UNIVERSITY

MENTORS: GENE MORRISON AND KATHY RAPHAEL

YEAR JOINED LOOMIS SAYLES: 2021

"The UWIN program opened my eyes to the possibilities. I had the opportunity to meet so many wonderful people with unique backgrounds, all in various roles throughout the company. I quickly learned that career paths are not linear and was inspired by the fact that I didn't need to have it all figured out. We build the road as we walk it."

## JUSTINE GEARIN

### SENIOR SUSTAINABILITY ASSOCIATE

UWIN PROGRAM: 2019-2020

SCHOOL: BENTLEY UNIVERSITY

MENTORS: MIKE MCDADE

YEAR JOINED LOOMIS SAYLES: 2021

"Prior to my participation in UWIN, I was not sure what I wanted to pursue for my career. I was so fortunate to have significant exposure to Loomis Sayles through both my internship and mentorship. These experiences allowed me to appreciate the culture and livelihood of so many industry experts. People at the firm took the time to explain the business of asset management in a way that complemented my courses at school. Everyone at Loomis Sayles is curious and excited about what they do, which drew me in instantly. Now, I am so happy to be part of a community of such amazing people working towards goals that make me proud of what we do."

INSPIRE.  
DEVELOP.  
RECRUIT.



# Alumni Spotlight

## MEGAN GIAMBANCO

### SENIOR CREDIT RESEARCH ASSOCIATE

UWIN PROGRAM: 2021-2022

SCHOOL: STONEHILL COLLEGE

MENTOR: MIKE GLADCHUN

"My first internship rotation with the Bank Loan Team was instrumental in my career development. While I gained valuable technical skills, I also benefited greatly from the guidance and insights of my managers. They generously shared their time, answered my many questions, and supported my curiosity to explore other areas of the business. Their encouragement and mentorship have been pivotal in leading me to my current role."



## KRISTEN MOLDOVAN

### CREDIT RESEARCH ANALYST

UWIN PROGRAM: 2017-2018

SCHOOL: BENTLEY UNIVERSITY

MENTOR: MARIANNE WINKELMAN

YEAR JOINED LOOMIS SAYLES: 2020

"There are two things that I learned early on during UWIN workshops - always be curious and always have an opinion. I have often reminded myself of these two mantras throughout my career. It's hard to be a good analyst in any field without asking questions or having a stance backed by research. The mentorship and internship program worked hand in hand not only to teach me hard financial skills, but also to mold me into a well-rounded professional. I am thankful to the UWIN program for providing me with the opportunities I have today and for everyone I've met along the way."



# Alumni Spotlight

## LIBBY DITOMASSO, CFA

### INVESTMENT ANALYST

UWIN PROGRAM: 2019-2020

SCHOOL: BENTLEY UNIVERSITY

MENTOR: NOREEN DROHAN

YEAR JOINED LOOMIS SAYLES: 2020

“The UWIN community and my mentor provided invaluable guidance, encouragement, and unique opportunities during my job search process. My mentor played a significant role in boosting my confidence to apply for my position on the Full Discretion Team. As an alumnus, the community continues to be a vital resource, offering a network of support and collaboration across Loomis and the industry more broadly. I am thankful to have had the opportunity to be part of the UWIN program and it is amazing to see how the program continues to grow and be successful.”



## STEPHANIE MITTAZ

### SUSTAINABILITY ASSOCIATE

UWIN PROGRAM: 2021-2022

SCHOOL: TUFTS UNIVERSITY

MENTOR: KATHRYN COBURN

YEAR JOINED LOOMIS SAYLES: 2023

“I feel lucky that Loomis Sayles is a company that puts such emphasis on mentorship. While I was a participant in UWIN, I got to learn through my meetings with my mentor, Kathryn, about how to establish a mentor relationship and make the most of our time together. I have been able to carry that experience with me while I continue to meet with both formal and informal mentors who have helped immensely in navigating my first job.”



# Alumni Spotlight

## SHAELYN FITZGERALD

### EQUITY RESEARCH ASSOCIATE

UWIN PROGRAM: 2020-2021

SCHOOL: UNIVERSITY OF MASS, AMHERST

MENTOR: ELIZABETH NAUGHTON

YEAR JOINED LOOMIS SAYLES: 2023

"I am very grateful for my long-term mentor, Elizabeth Naughton, who has been there for me consistently since fall 2020. She has taught me to approach things with confidence, to know my worth, and to go where I will be most happy. The UWIN program has given me a group of female leaders at the firm to look up to and has given me access to other parts of the firm to connect with people with different experiences. It has been one of the many reasons I returned to work at Loomis Sayles full time."



## LAUREN MURRAY

### EM CORPORATE DEBT ASSOCIATE

UWIN PROGRAM: 2022-2023

SCHOOL: NORTHEASTERN UNIVERSITY

MENTOR: JACK CELATA

YEAR JOINED LOOMIS SAYLES: 2023

"Having a mentor was a life changing experience for me - including helping me build confidence in myself and my capabilities and connecting me with others at the firm to guide me in choosing a career path. I am so thankful for my mentor for being there for me! The internship and mentorship were integral not just to my college experience and start of my career, but to my character and professional development. Being at Loomis Sayles and getting to know the people I was working with helped me realize what I value in my career. The IDEALS resonate with how I want to hold myself at work, and who I want to surround myself with."



# Alumni Spotlight

## VANDANA PATEL

### EM CORPORATE DEBT ASSOCIATE

UWIN PROGRAM: 2022-2023

SCHOOL: UNIVERSITY OF MASS, AMHERST

MENTOR: SEAN SAIA

YEAR JOINED LOOMIS SAYLES: 2024

“Being that it was one of my very first times being exposed to the investment management industry, I found it very helpful to have extensive structured sessions that encompassed a broad range of information. These sessions, paired with having a mentor in the program, enabled me to understand the industry and firm from my mentor’s perspective, who was able to strengthen my overall understanding. I am grateful for a community that UWIN has fostered here at Loomis Sayles and throughout the industry!”



## CATHERINE FERRI, CFA

### SENIOR CREDIT RESEARCH ASSOCIATE

UWIN PROGRAM: 2020-2021

SCHOOL: BABSON COLLEGE

MENTOR: DAVE SIMMONS

YEAR JOINED LOOMIS SAYLES: 2021

“UWIN’s mentorship program strategically equips participants with sponsors at pivotal points in their professional development. I am grateful that my mentor conveyed his industry expertise to facilitate meaningful connections, understand my strengths and interests, and push me to pursue the goals I previously thought were beyond my scope.”



# Inside a UWIN Mentorship

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

**Dave:** I joined the mentorship programs as a way to give back to others and help Loomis find future employees. I remember not having a clue as to what paths were out there for me when I was in college. I found Loomis purely by having a friend that worked here. I really didn't know much about the firm or the career paths it offered. I feel like I wasn't alone, and to this day, I think many aren't sure what their options are. It's important to not miss on a hire. From experience interviewing people, it can be tough to hire people based on a couple of interviews. We've learned the hard way at times. The mentorship process is a more thorough way of vetting prospective hires.

**Allison:** I was introduced to the investment management industry in January of 2024, about halfway through my junior year of college, and was immediately interested. As a non-business major, I knew I had a lot to learn and I wanted to learn quickly. The UWIN monthly workshops offered a great way for me to gain exposure to the foundational skills and knowledge I wanted to build that I couldn't through my college curriculum. I was also excited to be paired with a mentor who would invest in my growth, and to learn from other professionals at Loomis Sayles about their careers. These connections presented an opportunity to discover how my personal passions align with investment management.

## How do you personally contribute to this mentee/mentor relationship?

**Dave:** The best way that I can help is by giving advice based on my career experiences and making connections. Giving advice on those things I've observed and practiced in my career at Loomis Sayles. Being honest and teaching what to do and what not to do and who to learn from who not to learn from. I like to push ABC, "always be curious" and asking follow up questions to challenge mentees to think outside the box. I also like to connect mentees with different people in different departments. It's important to learn from different people, with different paths and perspectives. After doing that, reviewing the meetings and advising on sending thank you notes and Linked In invites to those people that took their time to assist.

**Allison:** First, I began our mentorship relationship by reflecting on what I wanted to learn and get out of this program. That helped inform my goals for the program, and I was able to communicate them with Dave. Additionally, I spend at least 2-3 hours before our biweekly meetings doing research on market headlines and reviewing any documents that Dave has sent my way. If there's anything I don't understand or am curious about, I'll make note of that and add it to my agenda for the meeting. I'll then send that agenda to Dave in advance. I also like to take care of meeting logistics when possible. This prep work is beneficial because we're able to get the most out of our meeting time. It helps us be present and cover more ground.



**MENTOR:** DAVID SIMMONS  
**ROLE:** SENIOR FIXED INCOME TRADER



**MENTEE:** ALLISON LAWS  
**SCHOOL:** THE OHIO STATE UNIVERSITY  
**UWIN PROGRAM:** MENTORSHIP 2024-25

# Inside a UWIN Mentorship

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

**Dave:** I like to meet students that are driven and inspiring. What students have to do to get the right job in the current job market has changed over the years. I like to learn their paths and what they are excited to do in life. I also like to share with non-finance majors how great this business is. Many times, I've converted them from wanting to do something in computer science to being in finance.

**Allison:** I always leave our meetings feeling energized. It's genuinely fun to go through my questions and discuss them. I've appreciated the support I've felt as well - Dave has given me real confidence in my ability to build a career in this industry. He's also been able to connect me with other professionals at the firm, and I've really enjoyed those discussions.

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

**Dave:** I've learned that it's best to come to meetings prepared. Allison has a complete outline of our meeting ready and sent before we meet. It's loaded with great questions from our "At the Open" note to headlines in the markets. Allison has such great, challenging questions. I actually look forward to hearing them. Sometimes I have to Google the answers. Anyone know how the DOW number (42K) is calculated? I mean the actual number. I had never heard of a "DOW diverser" formula. So, there's always something you don't know.

**Allison:** Dave does a great job of explaining concepts and terms in an intuitive way. I leave each meeting having learned about multiple new concepts. He'll ask me follow-up questions to make sure I understand. We've discussed topics from the bond-buying process and operations to credit crunches and the VIX index. He's taught me not to be afraid to ask about something if I'm curious. Oftentimes, what I think might be a "dumb question" actually leads to a great conversation (I thought everyone but me knew what the DOW number actually was).

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

**Dave:** Starting each meeting by being prepared and eager to learn from each other. Being energized and ready to talk about anything. Letting the mentee guide the discussion in any way they want by having an open agenda at each meeting. Connecting on a personal level is also important as well.

**Allison:** I like to start our meeting by checking in and staying updated on what's going on in each other's lives. Dave has said, "there's something we have in common with everyone." It's been valuable to connect on our common interests before diving into my technical questions. I find it more enriching when I'm able to learn from my mentor on a personal level as well. I also come prepared with specific industry-related topics to cover, but let the discussion flow organically.

## What advice would you provide to future UWIN participants?

**Dave:** As a mentor, you can help people more than you think and it doesn't take much time to do it. This is an easy way to make a difference in people's lives and guiding today's youth. It is also helpful getting good people in the door for whom you might have to work with one day.

**Allison:** Participating fully and having good communication with your mentor is important. Define those boundaries at the beginning of the mentorship and don't be afraid to advocate for yourself. The mentors in the program are excited to help and work with mentees! As Dave says, always be curious. Enjoy the process of asking questions and learning. Also, it's nice to get to know your mentor personally. While there is a lot of professional knowledge to gain from your mentor, you'll find there is so much to learn from them as an individual as well. Lastly, make sure you take notes! I have an extensive document filled with notes from our meetings, and I enjoy being able to reference them.



# Inspiring Speaker Series

We hosted **Teddy Droseros**, founder of Grateful Peoples, for an Inspiring Speaker event in 2024 in partnership with the Loomis Sayles Healthy Minds program. Healthy Minds' mission is to build a culture of mental health well-being and foster a workplace that promotes and supports the mental health of all employees, their families and loved ones. Teddy founded Grateful Peoples on the idea that if we focus on getting the most out of the present moment, we set up the best possible foundation for our future. Teddy's friend and college roommate Chris Morris, member of Loomis Sayles's Institutional Services Team, kindly made the connection. It was an inspiring discussion focused on the topic of expressing and incorporating gratitude into our lives. All participants in this webinar received a gratitude journal.

We hosted **Ivy Zelman**, executive vice president and co-founder of Zelman & Associates, for an engaging and inspiring discussion about her life including the power of networking and relationships, launching her firm in the midst of the global financial crisis, balancing life with work, facing setbacks and overcoming hurdles, and navigating Wall Street. A highly respected leader on Wall Street, Ivy is widely known and respected for her bold thinking and accurate assessments, helping industry players avoid costly mistakes and capture opportunities.

*"Much of building a network boils down to remembering that everyone you interact with, at any level, is a human being. There is nothing to be gained from panicking or being curt, and everything to be gained from exuding positivity."*  
**Ivy Zelman**

*"If you want to be as successful as you possibly can, you need to embrace networking as a way of life."*  
**Ivy Zelman**



**TEDDY DROSEROS,**  
FOUNDER OF GRATEFUL PEOPLES

You can purchase a journal and learn more about Teddy's incredible efforts here: [Grateful Peoples](#)



**IVY ZELMAN,** EXECUTIVE VICE PRESIDENT &  
CO-FOUNDER OF ZELMAN & ASSOCIATES

To learn more about Ivy's incredible journey, accomplishments, and life lessons, check out her book [Gimme Shelter: Hard Calls + Soft Skills from a Wall Street Trailblazer.](#)

# GOOD NEWS!

## A SPOT LIGHT ON ADVANCEMENT



### Graduates Launching Careers & Advanced Degree Programs in 2025

- Sabrina Frusco, Wellesley College - MUFG
- Lily Gofman, Babson College - Loomis Sayles
- Allison Laws, The Ohio State University - Loomis Sayles
- Sarah Monsini, Bryant University - Loomis Sayles

### Undergraduate Internships for Summer 2025

- Cristina Aguilar, Wellesley College - MUFG
- Nicole Brewer, Bentley University - Bank of New York
- Amelia Dupont, Wellesley College- Renaissance Re
- Krisha Gogri, University of Massachusetts Amherst - Barings
- Katherine Hsu, Brandeis University - Citigroup
- Keira Lyle, University of Massachusetts Amherst - Fidelity Investments
- Meghan Maher, University of Massachusetts Amherst - GID
- Alyssa O'Leary, Bentley University - Travelers Insurance
- Kate Radulski, University of Massachusetts Amherst - Fidelity Investments
- Bella Werner, Babson College - HPS Investment Partners
- Sophia Zelaya, Babson College - Apple Inc.
- Abby Romano, Babson College - Santander Bank
- Chloe Gagnier, Gettysburg College - Northeast series of Lockton Companies, LLC

### Undergraduate Updates

- Elina Chen, University of Massachusetts Amherst - Elected to CFO of Smart Women Securities and obtained the Artificial Intelligence Fundamentals Certificate from IBM
- Alexandria Dente, Northeastern University - Joined Deloitte as a tax consultant as part of Northeastern's co-op program and promoted to President of Northeastern's Women in Finance club.
- Angie Dulin, Northeastern University - Completed a 6 month co-op at Wellington Management, elected VP of Finance and Operations for the Council for University Programs at Northeastern, published an equity research report on the medtech industry with her team, and will run the Chicago marathon in support of Camp One Step.
- Meghan Maher, University of Massachusetts Amherst - Promoted to President of the UMass Real Estate Club
- Alyssa O'Leary, Bentley University - Accepted into Bentley University's Advanced Standing in Finance Program to earn a master's degree in finance within four years. Accepted into Girls Who Invest's Online Intensive Program.
- Kate Radulski, University of Massachusetts Amherst - Elected Co-CEO for Smart Women Securities and Co-President of the Investment Club

# GOOD NEWS!

## A SPOT LIGHT ON ADVANCEMENT



### Alumni Good News

- Bridget Clark (Bentley University) was promoted to Finance Manager at athenahealth where she works on their corporate financial planning and analysis team.
- Megan Giambanco (Stonehill College) was promoted to senior associate in Credit Research at Loomis Sayles and passed the CFA Level 1 Exam.
- Karolina Ioukhnikov (University of Massachusetts Boston) welcomed a beautiful baby girl named Kamila.
- Ariana Lucera (Bentley University) accepted a new position as Director of Operations and Strategic Growth for a climate-tech startup called Onvector.
- Morgan Medeiros (University of Massachusetts Boston) is working with the Volunteer Lawyers Project in the Family Law and Guardianship Unit at the Suffolk Probate Court and plans to graduate from New England Law Boston in May 2025.

### Good news from the UWIN team

- Catherine Ferri passed the CFA Level 3 Exam.
- Kristy Keenan and her husband welcomed a beautiful baby boy named Conor.
- Kristen Moldovan passed the CFA Level 2 Exam and was promoted to Analyst.
- Lauren Murray passed the CFA Level 1 Exam.
- Marissa Neill was promoted to HR Business Partner.
- Shannon O'Mara was promoted to Co-Director of Credit Research and was recognized as one of Pensions & Investments' Influential Women in Institutional Investing.

**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 2025-2026

In order to be considered for the UWIN program, you must provide an application, a resume, and a cover letter. Applications are available on the careers section of the Loomis Sayles website beginning February 1, 2025. **We strongly encourage all people who are committed to advancing the UWIN mission to apply, regardless of gender or gender identity.**

## RECRUITING DATES

**February 1, 2025:** Applications open on the Loomis Sayles careers website

**February 19, 2025:** UWIN Information Session

<https://careersloomissayles.com>

**March 7, 2025:** Applications due

**March 17 - 28, 2025:** Candidate interviews

**April 14, 2025:** Decisions communicated

### CONTACT US

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### VISIT OUR WEBSITE

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



[@eUWIN\\_loomissayles](https://www.instagram.com/eUWIN_loomissayles)



[www.loomissayles.com](http://www.loomissayles.com)  
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## UWIN LEADERSHIP

Shannon O'Mara, CFA, Co-Director of Credit Research & Founder of UWIN and Program Leader

Andrea DiCenso, Portfolio Manager & Strategist – UWIN Advisor

Erika Fallon, Administrative Manager & Executive Assistant – UWIN Events Coordinator

Catherine Ferri, Senior Research Associate – UWIN Mentee Advisor

Justine Gearin, Senior Sustainability Associate – UWIN Intern 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, Analyst – UWIN Internship Program Coordinator

Lauren Murray, ADP Associate – UWIN Intern Advisor

Marissa Neill, HR Business Partner – UWIN Marketing & Recruiting

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

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