



The Washburn Finance Society (WFS)

The Washburn Finance Society (WFS) is a student organization formed to attract students from all areas of study with the common link being an interest in finance. The WFS officers for the fall semester of 2011 are:

Pres. Rizki Aljupri: rizki.aljupri@washburn.edu (785 217 4202)

Please contact the WFS President for WFS membership information.

SPRING GREETINGS! This is what we have tentatively planned for the Spring semester.

- ⇒ First meeting from 12:30 p.m. to 1:15 p.m., Lincoln Room, Memorial/Student Union, Tuesday, Jan. 24.
- ⇒ Second meeting from 12:30 p.m. to 1:15 p.m., Lincoln Room, Memorial/Student Union, Tuesday, Feb. 21.
- ⇒ Third meeting from 12:30 p.m. to 1:15 p.m., Lincoln Room, Memorial/Student Union, Tuesday, Mar. 27.
- ⇒ Fourth meeting from 12:30 p.m. to 1:15 p.m., Lincoln Room, Memorial/Student Union, Tuesday, Apr. 24.
- ⇒ Food and drink are typically supplied at meetings.
- ⇒ First meeting will be an informative meeting for the new members.
- ⇒ We would like to have guest speakers at our other three meetings. Details will be announced later.
- ⇒ We shall plan for a trip in the spring. We are currently considering RISE at Dayton or trip to an exchange in Chicago and New York.

Mission

The mission of WFS is to learn more about finance through interacting with fellow students in educational and social activities. In the past, WFS has held ongoing social events, participated in a great variety of investing games, sponsored many outstanding guest speakers, and taken part in educational trips including an annual visit to such sites as the New York Stock Exchange, Chicago Board of Options, and Redefining Investment Strategy Education (R.I.S.E.) symposium in Dayton, Ohio. Other annual activities typically have included participation in homecoming festivities, fundraisers, and charitable works.

History

The WFS was formed in 1993 with the help of faculty advisor Rob Hull, and several students majoring in finance. The first president was Craig Miller, a native of Topeka and graduate of Hayden High School. Craig went on to receive his MBA from K.U. and has worked in international trade for a Kansas City firm. Subsequent presidents include: Casey Wilhm (who graduated from Washburn Law School and is a native of Topeka); John (Mwangi) Macharia

(who works for NASDAQ and is a native of Africa); Ivan Krsticevic (who works on Wall Street and is a native of Eastern Europe); Chris Bouck (who has worked in investment banking in Switzerland and the Cayman Islands and is a native of Overland Park, Kansas); Amy Kutschka (who was a top-ranked student in Washburn Law School and a native of Salina, Kansas now practicing law in that region); Justin Grady (who works for the state of Kansas while finishing his MBA at K.U. and is a native of Dodge City, Kansas); Evan Mulch is from western Kansas and did graduate work at Cambridge and is now Community Director/Owner at University Neighbor in Cincinnati. Erin Menard played basketball on Washburn's championship women's basketball team. Most recently, the 2007 president, Dann McNulty was from Overland Park, Kansas, and was accepted for graduate school at the University of Kansas. Daniel Hersch was 2008 president and also a member of the Washburn gulf team. The 2009 president was Brandon Holle from near rural Manhattan. The 2010 President and Vice President were Megan Carrica and Kari Bellinger from Minnesota and nearby Oskaloosa, KS, respectively. The fall 2011 president was Isabella Gilchiri. Besides the WFS officers, many other student members since 1993 have gone on to graduate studies and have attained key financial positions in the businesses throughout the world. Most recently, Gwen Ritter of Deutsche Bank returned to speak at the Washburn Wake-Up Breakfast and was honored as a distinguished alumnus.

Major Activities

For the most of the recent years, about a half dozen WFS members have attended the Redefining Investment Strategy Education (R.I.S.E.) symposium in Dayton, Ohio. Each year, this educational convention brings together leading students from colleges and universities throughout the United States and involves many renowned speakers from the business world. Famous leaders representing top-notch businesses conduct learning experiences and seminars. This past year was the fourth consecutive year that WFS members have participated in the annual R.I.S.E conference. It was also the first year that Washburn finance students gave a portfolio presentation at this conference. For more information on R.I.S.E. go to:

<http://www.sba.udayton.edu/rise/index.asp> .

In addition to R.I.S.E, WFS members participate in other out of town events. Most recently WFS toured the Chicago Board Options Exchange (CBOE) and WFS members continue to frequently travel to New York City where they visit the New York Stock Exchange. The New York trips often take in other sites such as the United Nation's World Headquarters, and the Salomon Smith Barney Building. On these educational trips, WFS members have a chance to network with alumni and past WFS members. The first trip to New York occurred in 1998 under the leadership of WFS Pres. Chris Bouck. The first CBOE trip was conducted under the leadership of WFS Pres. Ivan Krsticevic.

Membership

Membership varies from year to year but typically involves about 15 to 20 active members. Those who pay their annual dues are placed on the WFS email list which keeps members up to date of job opportunities, internships, meetings, events, activities, and trips. In the past, most of the members have been undergraduate finance majors but there have been active members who were

both non-finance Washburn University majors and Washburn University MBA students.

Advisor Duties

Professor Rob Hull has been the WFS Advisor since its founding in 1993 but all business faculty involved in teaching finance participate from time to time. The advisor attends meetings and activities when available. The advisor is involved with the election of officers and also maintains a list of officers and members so as to email out job information and internship possibilities to WFS members. The advisor encourages the WFS members to be independent and manage their activities responsibly. While the WFS group maintains its own sense of autonomy and self-sufficiency, the advisor tries to be available to answer questions and help out as needed especially by offering advice based on prior experience with the group. The advisor typically signs off on all forms.

WFS Lock Box and Display Case

On the third floor of the Henderson Learning Center, the School of Business maintains a lock box for WFS use and a glass display case where one can find pictures of WFS students and their activities.

Long-Term Goals

- To continue to attend conferences (such as R.I.S.E.) and visit educational sites such as CBOE and NYSE.
- To maintain the group through recruiting underclass business students who plan on studying finance (or who are at least interested in finance topics).
- To manage an investment portfolio for the university so that members can have hands-on experience in developing, planning, and investing university funds while helping the university wise invest its funds. NOTE. This goal of investing actual funds for Washburn was established in 2007 when an SOBU portfolio management class was established.

Information for Upcoming Year (2012-2013)

WFS President 2012 (spring):

Pres. Rizki Aljupri @ rizki.aljupri@washburn.edu (785 217 4202)

Information on WFS:

<http://www.washburn.edu/sobu/rhull/WFS.website.pdf>

Day & Time of Meetings: Most recently, WFS have met once or twice a month on a week day evenings that best fits members' schedules.

Meeting Location: Washburn Student Union (exact room location announced in advance)

Campus Advisor Information: Dr. Rob Hull, Clarence King Endowed Professor of Finance @ rob.hull@washburn.edu

Membership: Membership varies from year to year. The goal is to have at least ten to fifteen active members each year. The official count of membership will only consider those who pay their dues. These members are placed on the official WFS email list and notified of events as well as job opportunities.

Sample of Guest Speakers the Past Twenty Years

Tony Somma (and various other officers), Westar

Jim Van Slyke, CFO of Central National Bank

John Minnick, Owner/Portfolio Manager, Minnick Capital Management

Jonathan Didde, Investment Representative, Edward Jones

Brad Perry, Commercial Lender, Intrust Bank

Don Thomas, Director of Agency/Training, Farm Bureau Financial Services

Ryan Mohwinkle, investment representative, New York Life

Phil Vostrejs, Director of Finance at Payless ShoeSource

Jeff Markiewicz of Markiewicz International

Jim Caplinger, CEO

Dennis Hill, President and founder of Hill's Financial Services

David Strohm, President and Chief Executive Officer of TrueNorth, Inc.

James Gourley and Duane Williams, CLASS

Nido Qubein (and other special speakers sponsored by SOBU)

Bruce Krueger, Chief Financial Officer of Capital City Bank

Randy Swain, Assistant Controller, Payless ShoeSource

Laura Kubinski, Cash Accounting Supervisor, Payless ShoeSource

Raymond Harvey, Senior V. P., Branch Manager, Kemper Securities, Inc.

Rod Miller, Kemper Securities, Inc., mutual funds