



F  S A

FINANCE AND INVESTMENT STUDENTS' ASSOCIATION

---

# PARTNERSHIP PACKAGE 2024-2025

# TABLE OF CONTENTS

<b>I. LETTER FROM PRESIDENT</b>	<b>3</b>
<b>II. ABOUT US</b>	<b>4</b>
• <i>Our Mandate</i>	
• <i>Key Statistics</i>	
<b>III. THE FISA ADVANTAGE</b>	<b>5</b>
<b>IV. OUR EVENTS</b>	<b>6</b>
• <i>Overview</i>	<b>7</b>
• <i>Finance 101</i>	<b>8</b>
• <i>Montreal Firm Tours</i>	<b>9</b>
• <i>Diversity in Finance</i>	<b>10</b>
• <i>National Stock Pitch Competition</i>	<b>11</b>
• <i>Toronto Networking Trip</i>	<b>12</b>
• <i>Careers In Finance</i>	<b>13</b>
<b>V. PARTNERSHIPS</b>	<b>14</b>
• <i>Title Partner</i>	<b>15</b>
• <i>Sponsorships</i>	<b>16</b>
<b>VI. PAST SPONSORS</b>	<b>17</b>
<b>VII. CONTACT US</b>	<b>18</b>



# LETTER FROM PRESIDENT

Dear Potential Partner,

I hope this letter finds you well! My name is Suvrata, and as the current President of the Finance and Investment Students' Association (FISA), I am thrilled to present your company with the opportunity to engage with one of the largest student-run finance associations in Quebec. FISA bridges the gap between classroom learning and the professional world by offering unparalleled opportunities to over 2,500 finance majors and 10,000 business undergraduate students at the John Molson School of Business (JMSB). These students represent some of the most dedicated and talented minds in Canada. FISA, along with our subsidiaries, the John Molson Trading League (JMTL) and the John Molson Investment Society (JMIS), is dedicated to shaping the next generation of finance professionals. We achieve this through a variety of conferences, workshops, firm tours, and networking events designed to connect you with the brightest minds and the professionals of tomorrow. Our events, including networking cocktails and case competitions, enable students to expand their networks and enhance their professional development throughout the year. This academic year, our core purpose remains the same: to organize engaging, educational, and impactful events, with a focus on networking and establishing new connections to influence the finance community at JMSB. Over the years, we have successfully hosted numerous flagship events.

This year, we are excited to introduce two new events to our roster: a Networking Cocktail, focused on celebrating Diversity in Finance, and the second edition of our highly successful National Stock Pitch Competition, which promises to be bigger and better than ever. As firms transition back to in-office operations, we are also keen to collaborate with companies to organize more office tours. Our corporate sponsors are the driving force behind these ambitious projects. The corporate relations team is dedicated to assisting our sponsors in navigating our sponsorship structures to find the best fit for their needs. Whether your company seeks to gain exposure, recruit individuals with diverse backgrounds and career interests, or engage in charitable causes, FISA offers numerous opportunities for involvement, all detailed in this sponsorship package. Partnering with our association will allow your company to connect with a talented and passionate group of students who are poised to become the next leaders of the financial industry. I invite you to explore the opportunities outlined below and get in touch with our Corporate Relations team. We look forward to developing long-lasting partnerships with you, which will undoubtedly help students prioritize your company over others. Help us make your organization a part of our most enriching years.

Warm regards,



Suvrata Gupta  
**President 2024-2025**



# ABOUT US

## OUR MANDATE

FISA, along with its subsidiaries, the John Molson Trading League (JMTL) and the John Molson Investment Society (JMIS), seeks to shape the next generation of finance professionals by offering conferences, workshops, and firm tours. In addition, FISA organizes networking cocktails and case competitions to allow students to continuously expand their network and develop their critical thinking skills throughout the year. This gives students the opportunity to bridge the growing gap that exists between what is taught in the classroom and what they need to know before entering the workforce. As the largest finance association in Quebec, we act as a resource to over 2,300 undergraduate students. Being students ourselves, the FISA team is in a position to truly understand the needs and wants of students and how to best serve them.

## KEY STATISTICS



**2,300+**

Finance Students Represented



**150+**

Average Student Attendance



**50%**

Minority Representation  
Across the Executive Team



**11,000+**

Combined Student Reach



**200+**

Events Hosted



**#1**

Finance Student Association in QC





# THE FISA ADVANTAGE

After having created an all new strategy that is well aligned with the changing industry, the 2023-2024 academic year is poised to be the most promising yet for our corporate sponsors. As a partner of FISA, our corporate sponsors gain to further position themselves by engaging in:



## THE LARGEST STUDENT ASSOCIATION IN QUEBEC

With a combined student reach of 20,000+ people and 2,000+ JMSB students, our association provides phenomenal exposure to students and recruiters both on campus and in person at our events, case competitions, cocktails, conferences and firm tours.



## STUDENT DEVELOPMENT

Since its establishment, FISA has assisted thousands of students in obtaining jobs in various industries in finance, most notably in capital markets, private equity, asset management and consultancy.



## ACADEMIC ADVANCEMENT

Students get to learn and engage in education beyond the classroom by being part of our subsidiaries, The John Molson Investment Society and the John Molson Trading League.



### JOHN MOLSON INVESTMENT SOCIETY

The John Molson Investment Society, is Concordia's only club focused on the world of capital markets and investments and is committed to serve as an access point for all students on campus interested in learning more about it. Every semester, the association holds workshops covering topics such as investing to recruitment among many more, and invites multiple front-office industry professionals to share their knowledge of the capital markets since their mission is to equip students with the necessary skills to secure a role within this industry. In their weekly meetings, JMIS hosts; open discussions, stock pitch program, equity analysis, and industry speakers valuation workshops in addition to giving weekly presentations covering numerous asset classes, recruitment strategies, and fundamental technical knowledge.



### JOHN MOLSON TRADING LEAGUE

The John Molson Trading League holds trading seminars as well as weekly competitions at the John Dobson Formula Growth Trading Lab using the Rotman Interactive Trader software. Students are exposed to equity and commodity trading, algorithmic trading, and building trading models on Excel using live data while refining their trading strategies accordingly. JMTL's has two main functions. The first being to recruit and train traders for Concordia University's delegation, at the Rotman International Trading Competition. Concordia normally place the highest in Quebec school. In the past we have placed 1st in S&P Capital IQ Equity Valuation Case, as well as 5th overall finish. The second function of JMTL is assistance with recruitment into Sales and Trading internship. This has included in the past professional speaker, bank tours, and direct interview set ups.





# OUR EVENTS

# OVERVIEW OF THE YEAR

## **FINANCE 101**

Our launch event every year, Finance 101, designed to showcase JMSB's offerings to finance undergraduates. It provides education on investment programs, career advisory services, CFA certification guidance, and networking with recruiters.

## **MONTREAL FIRM TOURS**

These firm tours will include an office welcome and presentation, visits to key departments to highlight their work and culture, and concludes with a networking cocktail, with a format customizable to each firm's needs.

## **DIVERSITY IN FINANCE**

The Networking Cocktail event promotes diversity and inclusion in finance by connecting students, alumni, professionals, and corporate partners to celebrate and support women, LGBTQ+ individuals, and people of color through networking and inspirational keynote speakers.

## **NATIONAL STOCK PITCH COMPETITION**

The National Stock Pitch Competition is a full-day event in which student teams perform and present detailed stock analyses to a panel of expert judges, providing practical experience, industry feedback, and networking opportunities in the equities and capital markets sector.

## **TORONTO NETWORKING TRIP**

FISA is reinstating the Toronto Networking Trip for the first time since 2019, providing 25 selected students with a three-day opportunity in the winter semester to visit Toronto-based firms, engage with key executives, and facilitate recruitment of Montreal's top finance students by leading firms.

## **CAREERS IN FINANCE**

An industry style cocktail event which aims to offer students a broader understanding of the plethora of careers available to them in the world of finance through networking opportunities and a cocktail event.







# FINANCE 101

September 26th, 2024\*

## ABOUT THE EVENT

Finance 101 is an introductory event designed to showcase what JMSB has to offer to finance undergraduates. It brings together the association's executives, faculty members, and finance industry leaders to elaborate on the various opportunities available to students pursuing a finance major. The event focuses on educating students about involvement in three of our school's premier investment programs, which provide practical investment management experience. Additionally, students receive information on career advisory services at Concordia, guidance on beginning the CFA certification process, and the opportunity to network with recruiters present at the event. This event aims to lay a strong foundation for students' finance careers by connecting them with valuable resources, recruitment opportunities, and industry insights.

## OUR PROGRAMS

Launched in 2000, the **Kenneth Woods Portfolio Management Program** (KWMPMP) provides a select group of undergraduate JMSB students with hands-on training in investment management by working with a real-life student run equities and fixed income portfolio of over \$5.6 million. The students in KWMPMP also take part in weekly seminars by prominent industry executives, have access to mentors across various branches of capital markets as well as top internship opportunities.

**KENNETH WOODS**  
PORTFOLIO MANAGEMENT PROGRAM

**Van  
Berkom** Investment  
Management  
Program

The **Van Berkom Investment Management Program** is an opportunity for undergraduate and graduate students to experience actively managing a portfolio of over \$3.5 million. The program focuses on North American small-cap stocks, with a goal of outperforming a small-cap benchmark. Members of the program are required to pitch stocks to the advisory Investment Committee, who provide insight and expertise into the capital markets, as well as mentorship with the goal of attaining a job or internship in the investment field.

With a focus on the transition to a low-carbon economy, the **Sustainable Investment Practicum's** goal is to provide a select group of John Molson students with practical experience managing a global equity portfolio with a sustainable investing mandate. The portfolio will prioritize industry leaders that work towards the transition to a low carbon economy while outperforming their peers in ESG factors and demonstrating strong financial performance.



**SUSTAINABLE INVESTING PRACTICUM**  
INVESTING WITH PURPOSE





# MONTREAL FIRM TOURS

Dates to be determined\*

## ABOUT THE EVENT

The firm tour starts with a welcome at the office and an introductory presentation. Guests then visit key departments, where representatives present their work and achievements. Highlights include critical tasks, team structure, and the culture of each department. Each department also showcases its unique contributions to the firm's success. The tour concludes with a networking cocktail for further discussion and relationship building. This format is flexible and can be customized to meet the specific needs and goals of each hosting firm.

## WHY BE PART OF THE EVENT?

### **Showcase Your Expertise:**

Highlight your key departments' unique work, achievements, and contributions to the firm's success.

### **Promote Company Culture:**

Provide a firsthand experience of your team structure, work environment, and unique company culture.

### **Facilitate Networking:**

Create opportunities for intimate discussions and relationship building with top students through a networking cocktail event.





# DIVERSITY IN FINANCE

November 14th, 2024\*

## ABOUT THE EVENT

The Networking Cocktail event is tailored to foster diversity and inclusion within the finance sector. This event brings together students, alumni, industry professionals, and corporate partners to promote and celebrate diversity, with a special focus on women, LGBTQ+ individuals, and people of color. Attendees have the opportunity to engage in meaningful conversations, build professional relationships, and listen to keynote speakers share their experiences navigating the finance industry as inspiring minorities and leaders who advocate for diversity.

- Inclusive panel discussion with leaders from diverse backgrounds, focusing on women.
- Valuable insights and experiences shared to highlight inclusivity and support.
- Welcoming atmosphere to ensure all feel valued and included.
- Networking cocktail event for professional development.



*FISA's Women in Finance, 2023*

# NATIONAL STOCK PITCH COMPETITION

February 1st, 2025\*

## ABOUT THE EVENT

The National Stock Pitch Competition is a day-long event where student teams compete to present the most compelling stock pitches to a panel of seasoned judges. Participants engage in in-depth fundamental stock analysis, developing their research, strategy, and presentation skills.

This competition provides students with practical experience and valuable feedback from industry experts. The event aims to prepare students for careers in equities and capital markets by offering them a platform to showcase their analytical abilities and connect with leading professionals in the field.

## OUR AIM

Being able to see peers pitch a stock live to real judges will allow students to understand what it's like to pitch a stock in a professional setting.

Whether it's a stock or another type of security, pitching is an extremely important skill for anyone working in finance. We want students to witness this skill being demonstrated first-hand.





# TORONTO NETWORKING TRIP

Dates to be determined\*

## ABOUT THE EVENT

For this first time since 2019, FISA is bringing back the Toronto Networking Trip. On this trip, 25 hand selected students will take part in a 3 day trip visiting Toronto-based firms and offices and will take place in the winter semester. This will provide our top students with invaluable opportunities to meet with key executives from some of the top firms and banks in Canada. Additionally, these events allow firms to recruit from Montreal's top finance students.

## HIGHLIGHTS FROM TORONTO FIRM TOURS:

**Network Growth:** Students are able to develop professional relationships and gain firsthand insights.

**Professional Development:** New relationships with mentors and advisors who can offer professional guidance.

**Cultural and Diversity Exposure:** New office locations expose new work cultures and perspectives.





# CAREERS IN FINANCE

March 6th, 2025\*

## ABOUT THE EVENT

The Careers in Finance is a formal event that will offer students a broader understanding of the plethora of careers available to them in the world of finance. The 5 a 7 event will be an industry style cocktail, with recruiters, booths, and countless networking opportunities.

The cocktail event will include many company representatives and booths providing firms with the opportunity to interact with students and create relationships with motivated students eager to enter the workforce.

## WHY BE PART OF THE EVENT?

- Maximum exposure to almost students looking for internships and permanent positions
- Networking event specifically designed for company representatives to speak to students
- Opportunity for firms to distribute marketing and recruitment material to students







# SPONSORSHIP OPPORTUNITIES





# PARTNERSHIP

Platinum Sponsorship offers unparalleled visibility and engagement opportunities for your company at our flagship events. As a **Platinum Sponsor**, your company will receive *title sponsorship of our premier event*, the National Stock Pitch Competition, and *primary sponsorship of one other high-profile event*: Finance 101, Diversity in Finance, or Careers in Finance. Additionally, you will have *the exclusive opportunity to host an engagement-style activity, such as a firm tour*, organized with your company.

## LIMITED SPOT & PRICING

**Standard Rate: \$25,000**

**Maximum Spots: 1**

## PLATINUM

### Privileges

- Title partner at NSPC, event of choice, and firm tour
- Unlimited company representatives at events
- Personalized coffee chat room at events
- Premium booth location set-up
- Maximum & personalized video content coverage
- Recruitment material and merch distribution at on-campus tabling
- Panel customization

### Event Participation and Networking

- Invitation to networking and cocktail dinner
- Mention on stage by the executive team
- Panel Speaker

### Marketing and Promotion

- Social media acknowledgment
- Comprehensive and consistent advertisement on **all** event materials
- Link and logo on FISA website

### Access and Engagement

- Survey insights
- Access to the student mailing list
- Access to student resume booklet

### Media and Content

- Catered photographs
- Distribution of advertisements, recruitment material, and company events
- Company's events reposting and sharing

*Payment details and plans can be discussed in detail.*



# SPONSORSHIPS

## OUR PACKAGES

	Gold	Silver +	Silver
Event of Choice	\$7,000	\$3,000	\$2,500
<b>Event Participation and Networking</b>			
• Invitation to networking and cocktail dinner	2 Events*	1 Event	1 Event
• Mention on stage by executive team	X	X	
• Company Representatives at Any Event	4	3-4*	2-3*
• Panel Speaker	X	X	
• Booth Setup	X	X	X
<b>Marketing and Promotion</b>			
• Social media acknowledgement	X	X	X
• Consistent advertisement on select event materials	X		
• Link and logo on FISA website	X	X	X
<b>Access and Engagement</b>			
• Survey insights	X	X	
• Access to student mailing list	X	X	X
• Access to student resume booklet	X	X	
<b>Media and Content</b>			
• Catered photographs	X	X	
• Distribution of recruitment material	X		
• Company's events reposting and sharing	X	X	
• Video Content Coverage	High	Med-Low	Low

## FIRM TOURS

Sponsoring our local and Toronto-based tours opens up a range of opportunities. As we pursue sponsorships for firm tours in Montreal this fall and prepare for our Toronto Networking Trip in February 2025, these partnerships offer a unique opportunity for firms to engage directly with students in a variety of ways:

- **Tailored Tours:** Highlight your company's operations and culture
- **Networking Luncheons:** Host catered lunches for relaxed networking and discussions
- **Engaging Workshops:** Offer insightful workshops that cater to students
- **Exclusive Evening Tours:** Provide after-hours (5 à 7 style), tours for intimate networking opportunities
- **Flexible Funding Allocation:** Sponsorship funds can cover transportation, accommodation, and more

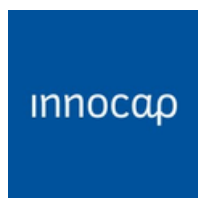
Seize the opportunity to elevate your brand and connect with students directly through our partnership options. We look forward to collaborating and creating engaging activities together.

\*A combination of sponsoring the National Stock Pitch Competition and an event of your choice.



# PAST SPONSORS

---



# CONTACT US

## Primary Contacts



**RAYAN MOHAMED**

**VP Corporate Relations**

rmohamed@fisajmsb.ca



**ANDREAS MACCALLUM**

**AVP Corporate Relations**

amaccallum@fisajmsb.ca



**ALAYNA WALIA**

**Director of Corporate Relations**

awalia@fisajmsb.ca



**TEAGAN RODRIGUES**

**Director of Corporate Relations**

trodrigues@fisajmsb.ca

## Secondary Contacts



**SUVRATA GUPTA**

**President**

sgupta@fisajmsb.ca



**ABDELRAHMAN MOHAMED**

**Executive Vice President**

amohamed@fisajmsb.ca



F | S A

**CONNECT WITH US:**



**FACEBOOK**  
@fisajmsb



**LINKEDIN**  
fisajmsb



**INSTAGRAM**  
@fisajmsb