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YOUNG INVESTOR SYMPOSIUM

THE FUTURE OF FINANCE

Expose

Educate

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PRAIRIE VIEW
A&M UNIVERSITY
COLLEGE OF BUSINESS

February 2, 2019

*Organized by Dr. Yi Zhang
Associate Professor of Finance*

PANELISTS

Sharon Criswell, CFA



Sharon Criswell recently retired from the position of Chief Operating Officer for ALM First Financial Advisors, LLC. She has been in the investment management business for over 20 years. Sharon received her charter in the 1990's and began serving on the CFA Society Dallas Fort Worth board. She currently serves on the CFA Society Austin board as well as CFA Societies Texas.

Marcus Malonson CFP®, CIMA®, CRPC®, CKP



Marcus Malonson is a senior Vice President, wealth management advisor, & retirement benefits consultant at Merrill Lynch. In his practice, he focuses on delivering a comprehensive approach to managing wealth that is client centric. His passion is to deliver excellent service and help clients pursue their goals.

Lauray Kennedy, MBA



Lauray Kennedy is a Financial Consultant at Charles Schwab & Co. In her current role, she strives to partner with her clients to understand their goals and create a personalized plan with expert investing guidance. She received her BS in Business Administration at the University of Texas El Paso and her MBA at the University of Houston.

MORNING

- 9:30 – 10 am Registration
- 10:00 – 12:00 pm Panel Discussion (Rm 127)
Opening speech – Dr. Munir Quddus, Dean
Moderator – Professor Danny Harvey
- 12:00 – 1:30 pm Lunch (invitation only, Rm 114)
Dr. Moosa Khan, Department Head

AFTERNOON

- 1:30 – 2:10 pm Breakout Session I
- 2:20 – 3:00 pm Breakout Session II
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| Trading Room (StockTrak/Bloomberg) | Rm 112 |
| Finance Club (Financial Literacy) | Rm 113 |
| Investment Club (Student Managed Fund) | Rm 115 |
| Cryptocurrency (Dr. Shahriari) | Rm 111 |
- 3:00 – 4:00 pm Awards Ceremony (Rm 127)
Chaired by Dr. Yi Zhang
- First Place – Nimitz High School
(\$1,000 Sponsored by Charles Schwab)
- Second Place – George Ranch High School
(\$800 Sponsored by College of Business Faculty)
- Third Place – Young Women's College Prep Academy
(\$500 sponsored by Ms. Caryn Davis, Bechtel Oil, Gas & Chemicals, Inc.)