

FINANCIAL MANAGEMENT ASSOCIATION

**UNIVERSITY OF SOUTH ALABAMA FINANCIAL MANAGEMENT
ASSOCIATION SEMESTER NEWSLETTER**

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YEAR AT A GLANCE

The 2020-2021 year for the Financial Management Association Chapter at the University of South Alabama featured several professional speaker events and networking opportunities. This year members were given the opportunity to learn more about the various career paths within the finance industry, including banking, financial advisors, and portfolio managers, to name a few.

FINANCIAL MANAGEMENT ASSOCIATION

2021 VIRTUAL FMA FINANCE LEADERS' CONFERENCE

March 3-5 2021

- We heard from keynote speaker Aaron Beam, former CFO of Healthsouth, who played a role in one of the largest corporate frauds in U.S. history. Having spent time in federal prison for this crime, he'll talk about corporate fraud and ethics from a first-hand perspective.
- We learned from leading industry experts on topics like ESG, Fintech, and Diversity & Inclusion, as well as how to achieve your career goals
- We had the opportunity to participate in a Future Traders Competition for a chance to win a cash prizes!
- We had the opportunity to meet finance professionals from "powerhouse" companies and financial career specialists.
- There was also a virtual career fair/exhibition, and we could include our resume in a digital resume book.



GUEST SPEAKERS

Highlights from a few of our guest speakers.



ERNESTO BERGERON

FMA hosted a Zoom meeting with guest speaker, Ernesto Bergeron. Ernesto Bergeron is a former bond trader on Wall Street in NYC. He is now a real estate broker and an investment advisor with Marcus and Millichap in Atlanta.

“I [was] so blown away by [Mr. Bergeron] knowing so much information about everything... We talked about events

that were driving changes in stock prices and what you would choose to invest in [he invited students to participate in the discussion by asking if you would choose to invest in] Tesla or GMC based on knowledge of hybrid cars [then if your investment decision would change if you had the knowledge that] gmc [is planning] to move fully electric soon. There was also some discussion about the stock market. In general, students asked questions, such as, “what should you do to be prepared to work on wall street”. He advised students to stay informed on current events and prove that you can think 10 years ahead on a stock because that's how you make a profit.” Sarah Barnes, FMA member



JOHN FERGUSON

FMA hosted John Ferguson, a Financial Advisor and First Vice President of Investments. He discussed his career path, gave advice on classes to take, spoke about his most meaningful “life-lessons” and advice that he was given, and answered questions about his career and about investments.

GUEST SPEAKERS

Highlights from a few of our guest speakers.

STRATEGIC WEALTH SPECIALISTS



FMA hosted a Zoom meeting with guest speakers Caresse Fincher and Tim Heath. Both Caresse Fincher and Tim Heath are managing directors at Strategic Wealth Specialists, a wealth advising firm. They discussed the future of financial advising as well as other important information regarding their company and the field of advising.

EMPLOYEE FIDUCIARY

FMA hosted Rebekah Cobb, the Director of New Business at Employee Fiduciary. Employee Fiduciary is a retirement plan management and operations company based in St. Petersburg Florida and Mobile. Employee Fiduciary manages retirement plans for other companies; Employee Fiduciary helps the companies set up and manage retirement funds as well as assist the companies with abiding by federal and state laws. She discussed the company and the importance of retirement funds for individuals as employees and employers.



2020-2021 EXEC BOARD

PRESIDENT: HAILS BURNETTE

As my term as president comes to a close, I want to thank the members of the University of South Alabama Financial Management association for allowing me the opportunity to serve our chapter this year. It has truly been an honor. I was fortunate to have been able to work with such a talented and quality exec board. Despite the unusual circumstances this year, we have added new members and had an outstanding amount of involvement in our meetings because of the diligent efforts of our exec board as well as all of our members.

Again, it has been my honor to serve as president this year; the friendships, professional relationships, and experiences that I gained from FMA and MCOB transformed my college experience, and I could not be more grateful. I am truly humbled to have had this opportunity and look forward to seeing how our organization thrives under the leadership of our upcoming exec board.



VICE PRESIDENT : MARY GRACE MAYER



It has been my honor to serve as the Vice President for the University of South Alabama chapter of the Financial Management Association. The networking and first-hand perspectives on career paths from professionals while being a member of FMA has been priceless. After graduation, I am working for a local accounting and advisory firm and plan to either get my MBA or Executive MBA. I have sincerely enjoyed my time as a business student at the Mitchell College of Business at South, and I have many fond memories and connections that will stay with me in the years to come.

2020-2021 EXEC BOARD

TREASURER: ETHAN FLOWERS

It has been my honor to serve as the Treasurer for the University of South Alabama chapter of the Financial Management Association. The leadership provided by our chapter advisor and our President has been invaluable and welcoming. The plethora of high-value speakers we have had talk to our members have been very informative. Lastly, the friendships and connections that have been made over the past year by members, faculty and staff, and financial professionals have had a drastic professional and personal impact on our chapter. I am excited to see how our chapter adapts and continues to provide meaningful service moving forward.



SECRETARY: KELSEY EDWARDS



Hello my name is Kelsey Edwards! After graduation, I will continue my internship at Austal through the end of May. Once I finish my internship, I plan to move back to Birmingham to work full time and attend a graduate program starting this fall to pursue an MS-Finance or MBA. I have enjoyed my time at the Mitchell College of Business and am truly thankful for the opportunities FMA provided. Getting to meet with and listen to different professionals helped me develop an idea of where I would like to take my career in finance.

INTRODUCING THE 2021-2022 EXEC BOARD

PRESIDENT: ETHAN FLOWERS



Hello! I am honored to serve as the incoming president for the University of South Alabama FMA chapter. This past year was very successful, from amazing speakers to great peers joining our chapter, and I am excited to meet and exceed the expectations for 2021-2022. My exec team and I have some big shoes to fill, but I am confident in our potential and excited to see how we perform.

VICE PRESIDENT: JORDIN D'AVERSA-WILLIAMS

My name is Jordin D'Aversa, the new Vice President of the Financial Managers Association at the University of South Alabama. I am a rising senior from Orange Beach, Alabama majoring in Finance and I am currently interning at Navy Federal Credit Union on their Equity Lending team. I pride myself on high integrity and time management as well as being a very reliable team member. I look forward to helping FMA grow its membership and helping show people how much FMA has helped me. I am very excited about everything this upcoming year will have in store for FMA.



INTRODUCING THE 2021-2022 EXEC BOARD

TREASURER: ALEX HUNT



Hey My name is Alex Hunt, I'm from Slapout, Alabama and have been a student here for almost 2 years now. I'm currently a senior majoring in Finance and will be graduating in the spring of 2022. I look forward to severing you guys as FMA treasure and excited to see what comes in the future! I look forward to having a great year with all of you and Go Jags!

SECRETARY: MACKENZIE ENDRES

Hello, My name is Mackenzie Endres and I am your Secretary for the Financial Management Association (FMA). First let me say thank you for this opportunity. I have thoroughly enjoyed being a part of the FMA over the last year as the opportunities and lessons learned through this association have been endless. I hope to help bring those same things this year! Although I was born in Pennsylvania and lived in Germany for three years, I call Huntsville, Alabama home. My hobbies include spending time with friends and generally anything that involves being at the beach! Fun facts about me...I am a certified Advanced Scuba Diver with about 50 dives to date including Costa Maya, Cozumel, Roatan, the Gulf of Mexico, and several Florida Springs. Also, as you may have guessed by where I've lived, I am a Military Brat, my dad retired after 22 years! I am excited to see what this year brings... Go Jags!!

