

## SWS 2025-2026 Alumni Lecture Series

8 out of 10 Attendance Mandatory to Fulfill Membership Requirements

\*Starred Lectures are Mandatory Regardless

Questions? Reach out to [cmu.sws@gmail.com](mailto:cmu.sws@gmail.com)

Date	Lecture	Speaker
Thursday, September 11, 2025 5-6 PM Tepper 2701	Freddie Mac Company Info Session	Speaker: Donald Kerr Company: Freddie Mac
Thursday, September 11, 2025 6-7 PM Tepper 2612	*Personal Finance, Saving and Investing	Speaker: Mary Stadelman Company: Northwestern Mutual
Thursday, September 18, 2025 6-7 PM Tepper 2612	*Understanding the Stock Market	Speaker: Madison Sharick Company: Madi Manages Money Mandatory Attendees: Kaitlyn, Zining
Thursday, September 25, 2025 6-7 PM Tepper 2612	*Analyzing Companies and Industries	Speaker: Kim Forrest Company: Bokeh Capital Partners Mandatory Attendees: Miranda, Hannah
Thursday, October 2, 2025 6-7 PM Tepper 2612	*Understanding Financial Statements	Speaker: Jessica Bemer Company: Expect Equity Mandatory Attendees: Saher, Iris, Samantha
Thursday, October 9, 2025 6-7 PM Tepper 2612	*Evaluating Companies with Financial Metrics	Speaker: Elise Lee Company: Federated Hermes Mandatory Attendees: Emma, Evelyn
Thursday, October 23, 2025 6-7 PM Tepper 2612	<b>Special Topics:</b> Introduction to Derivatives and Hedging	Speaker: Professor Burton Hollifield Company: Carnegie Mellon University Mandatory Attendees: Linda, Kaitlyn
Thursday, October 30, 2025 6-7 PM Tepper 2612	<b>Special Topics:</b> Investment Banking and Private Equity as a Career	Speakers: Cale Grove and Eric Haufler Company: Incline Equity Partners Mandatory Attendees: Zining, Miranda, Samantha
Wednesday, November 5, 2025 6-7 PM Tepper 2612	<b>Special Topics:</b> Asset Management as a Career: A Day in the Life of a Portfolio Manager	Speaker: Anne Wickland Company: Expect Equity Mandatory Attendees: Hannah, Saher
Thursday, November 13, 2025 6-7 PM Tepper 2612	<b>Special Topics:</b> Career in Wealth Management	Speaker: Lara Dalton Company: Embree Financial Mandatory Attendees: Iris, Evelyn,

Thursday, November 20, 2025  
6-7 PM  
Tepper 2612

**Special Topics:** Career in  
Investment Management

Speaker: Mandi Surgeon  
Company: Highmark Health  
Mandatory Attendees: Emma, Linda