### Oberlin Business Scholars Itinerary

Oberlin, Cleveland, New York, Boston

January 4–27, 2012

<table>
<thead>
<tr>
<th><strong>Wednesday</strong></th>
<th><strong>January 4, 2012</strong></th>
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</thead>
</table>
| **9:00 am**   | **Orientation Meeting**  
Liz Lierman (Oberlin College)  
Location: Stevenson Hall  
Oberlin, OH |
| **Noon**      | **Keynote Luncheon**  
Alan Wurtzel '55  
Location: Oberlin Inn  
Oberlin, OH |
| **2:00 pm**   | **The Habits of Mind for Business Strategies**  
Alan Wurtzel '55  
Location: Stevenson Hall  
Oberlin, OH |
| **3:30pm**    | **Business Basics & Definitions**  
Beth Tallman (Oberlin College)  
Location: Stevenson Hall  
Oberlin, OH |

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<tr>
<th><strong>Thursday</strong></th>
<th><strong>January 5, 2012</strong></th>
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| **9:00 am**   | **Business Communications**  
Mark Wiskup (Wiskup Communications)  
Location: King 239  
Oberlin, OH |
| **12:30 pm**  | **Business Etiquette Luncheon**  
Robert Shutt (RASolutions)  
Location: Oberlin Inn  
Oberlin, OH |
| **3:30pm**    | **Introduction to Case Studies**  
Beth Tallman (Oberlin College)  
Location: Stevenson Hall  
Oberlin, OH |

*Revised January 14, 2012*
### Friday, January 6, 2012

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Instructor</th>
<th>Location</th>
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</thead>
<tbody>
<tr>
<td>8:30 am</td>
<td>Public Speaking</td>
<td>Kathryn Stuart (Oberlin College)</td>
<td>Stevenson Hall Oberlin, OH</td>
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<tr>
<td>11:00 am</td>
<td>Business Writing</td>
<td>Nick Petzak (Oberlin College)</td>
<td>Stevenson Hall Oberlin, OH</td>
</tr>
<tr>
<td>12:30 pm</td>
<td>Financial Statements &amp; Excel</td>
<td>Paul Pahoresky (Oberlin College)</td>
<td>Cooper International Learning Center (Peters 330) Oberlin, OH</td>
</tr>
</tbody>
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### Monday, January 9, 2012

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Instructor</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 am</td>
<td>Case Study Group Time &amp; Meetings with Faculty Mentors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Noon</td>
<td>Financial Statements &amp; Excel</td>
<td>Paul Pahoresky (Oberlin College)</td>
<td>Cooper International Learning Center (Peters 330) Oberlin, OH</td>
</tr>
</tbody>
</table>

### Tuesday, January 10, 2012

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Instructor</th>
<th>Location</th>
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</thead>
<tbody>
<tr>
<td>9:30 am</td>
<td>Myers-Briggs &amp; Teamwork</td>
<td>Liz Lierman &amp; Donna Russell (Oberlin College)</td>
<td>Stevenson Hall Oberlin, OH</td>
</tr>
<tr>
<td>11:00 am</td>
<td>Advice from a Former Business Scholar</td>
<td>Doug Pace ’09 (Edgeview Partners)</td>
<td>Stevenson Hall Oberlin, OH</td>
</tr>
<tr>
<td>12:30 pm</td>
<td>Philanthropy, Relationship Management &amp; Packing for Business Travel</td>
<td>Brad Hayes (Oberlin College)</td>
<td>Stevenson Hall Oberlin, OH</td>
</tr>
<tr>
<td>2:30 pm</td>
<td>Case Study Group Time &amp; Meetings with Faculty Mentors</td>
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<td></td>
</tr>
</tbody>
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*Revised January 14, 2012*
Wednesday  January 11, 2012

11:30 am  **KeyBank**
Valerie Raines, Julius Hill '04, et al (KeyBank)

Location:  KeyTower, Great Lakes Room on the 10th Floor
127 Public Square
Cleveland, OH 44114

3:00 pm  **Health Care Management**
Dr. Tom Abelson '72 (Beachwood Family Health & Surgery Center, Cleveland Clinic)

Location:  26900 Cedar Road
Beachwood, OH 44122

Thursday  January 12, 2012

9:00 am  **International Business**
Lauren Abendschein '07 (Credit-Suisse)
Evelyne White '04 (Riverside)
Kamal Quadir '96 (CellBazaar)

Location:  Mudd Library
Oberlin, OH

2:00 pm  **Fund Management**
Fred Cummings '89 (Elizabeth Park Capital)

Three Commerce Park Sq
23230 Chagrin Blvd #835
Beachwood, OH 44122

Location:  Riverside Company
50 Public Square, 29th Floor
Cleveland, OH

Friday  January 13, 2012

8:00 am  **Healthcare & Events**
Eleanor Hayes '76 (Cleveland Clinic)

Location:  InterContinental Hotel & Conference Center
9801 Carnegie Avenue
Cleveland, OH 44195

12:30 pm  **American Greetings**
Katherine Readey ’96

Location:  American Greetings
One American Road
Cleveland, OH 44144-2398

*Revised January 14, 2012*
Monday January 16, 2012

1:00 pm  **Wall Street Overview**  
Neil Barsky ’81 (Barsky Ventures)  
Location: 250 West 57th Street  
New York, NY

3:00 pm  **Venture Capital**  
Jim Toth ’01 (Investor Growth Capital)  
Location: Investor Growth Capital  
1 Rockefeller Plaza, Suite 2801  
New York, NY 10020

5:00 pm  **Dress for Success**  
Location: Brooks Brothers  
346 Madison Avenue  
New York, NY

Tuesday January 17, 2012

11:00 am  **Landing Jobs & Internships on Wall Street**  
Gregg Feinstein (Houlihan Lokey)  
Location: Houlihan Lokey  
245 Park Avenue, 20th Floor  
New York, NY

12:30 pm  **Investment Banking**  
Leslie Dawe ’85 (UBS)  
Ed Fishman ’73 (Cain Brothers)  
Geoff Harris ’83 (Gleacher)  
Alex Jones ’96 (Sterne Agee)  
Location: UBS  
1285 Avenue of the Americas, 14th Floor, Room 10-11  
New York, NY

3:30 pm  **Deutsche Bank**  
Alessandra DiGiusto ’83  
Roger Heine ’79  
Eric Katzman ’86  
Location: Deutsche Bank  
60 Wall Street, 17th Floor, Room 47G  
New York, NY 10019

Wednesday January 18, 2012

8:00 am  **Nonprofit Management**  
Roni Kohen-Lemle ’76 (Long Island Children’s Museum & Third Street Music School)  
Lee Koonce ’82 (Third Street Music School Settlement)  
Suzanne LeBlanc (Long Island Children’s Museum)
Robert Lemle ‘75 (Long Island Children’s Museum)

Location: DeWitt Stern Group
420 Lexington Avenue, Suite 2700
New York, NY

10:00 am **Insurance**
Carol Levine ‘84 (Levine Company)
Michael Marshall ‘79 (New York Life Insurance Company)
Chandar Potter (Zurich, N.A.)
Jolyon Stern ’61 (DeWitt Stern Group)

Location: DeWitt Stern Group
420 Lexington Avenue, Suite 2700
New York, NY

12:00 pm **Prime Services**
Phil Vasan ’80, *et al* (Credit-Suisse)

Location: Credit-Suisse
11 Madison Avenue 3rd Floor
New York, NY 10010

3:30 pm **ALCOA**
Julia Steyn ’96

Location: ALCOA
390 Park Avenue
New York, NY 10022

Thursday

9:00 am **Healthcare Investing**
Stephen Sands ’78 (Lazard)

Location: Lazard
30 Rockefeller Plaza
New York, NY 10020

11:00 am **Let’s Make a Deal!**
Bela Szigethy ’77 (Riverside Company)

Location: Riverside Company
45 Rockefeller Center, 24th floor
630 5th Avenue
New York, NY

1:30 pm **Managing Operations**
Bill Hirshorn ’86 (Morgan Stanley)

Location: Morgan Stanley
750 Seventh Avenue (Cross Streets: 49/50)
New York, NY

4:00 pm **Hedge Funds**
Tom Kutzen ’76 (AlphaBridge Capital)

Revised January 14, 2012
Leah Modigliani ’86 (Neuberger Berman)
Steve Shapiro ’83 (Intrepid Capital)
Siddharth Thacker ’99 (PioneerPath Capital)

Location: Neuberger Berman
605 Third Avenue (Cross Street: 40), 42nd Floor, Room 30
New York, NY

6:00 pm  **Networking Reception**
Location: Yale Club
50 Vanderbilt Avenue
New York, NY

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**Friday**  
**January 20, 2012**

**8:00 am  Business and the Law**
Conrad Bahlke '80 (Stroock & Stroock & Lavan)
Carey Dunne ’80 (Davis Polk & Wardwell)
Nate Eisler ’80 (Hughes, Hubbard & Reed)
Richard Greenberg '66 (Newman & Greenberg)
Steven Schindler ’80 (Schindler, Cohen & Hochman)
Dan Zucker '81 (Sony Music)

Location: Davis, Polk & Wardwell
450 Lexington Avenue, 8th Floor
New York, NY  10017

**10:00 am  Management Consulting**
Karl Kellner ’92, *et al.* (McKinsey & Company)

Location: McKinsey & Company
Park Avenue Plaza (55 East 52nd Street), 21st Floor, Room 2122
New York, NY

**1:00 pm  Consulting**
Katy George ’88 (McKinsey & Company)
Sanjaya Krishna ’87 (KPMG)
Luke Squire ’11 (Booz Allen Hamilton)

Location: McKinsey & Company
55 East 52nd Street
New York, NY

**3:00 pm  Be the CEO of Your Own Career**
Jeff Hanson ’80 (Hanson Advisors)

Location: 235 West 56th Street
New York, NY

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**Monday**  
**January 23, 2012**

**9:00 am  Public-Private Partnerships for the Environment**
Tom Powers ’70 (Boston Harbor Island Alliance)
Brad Swing ’83 (City of Boston)

*Revised January 14, 2012*
Location: Fidelity
245 Summer Street, 14th Floor, Conference Room T
Boston, MA

10:30 am  Entrepreneurship
John Farber ’77 (Product Development Workshop)
Dave Kaemmer ’85 (iRacing.com)
John Puterbaugh ’91 (Nellymoser, Inc.)
Michael Rubenstein ’84 (CambridgeSoft Corporation)

Location: Fidelity
245 Summer Street, 14th Floor, Conference Room T
Boston, MA

12:30 pm  Fidelity
Lisa Emsbo-Mattingly ’90, Sean Gavin ’98, et al. (Fidelity)

Location: Fidelity
245 Summer Street, 14th Floor, Conference Room T
Boston, MA 02109

Tuesday  January 24, 2012

9:00 am  International Business
Andrew Rand ’89 (Brown Brothers Harriman)

Location: GMO
40 Rowes Wharf
Boston, MA

10:00 am  Hedge Funds
Paul Reeder ’83 (PAR Capital)

Location: GMO
40 Rowes Wharf
Boston, MA

11:00 am  GMO
Nick Nanda ’03

Location: GMO
40 Rowes Wharf
Boston, MA

3:30 pm  Marketing and Consulting
Steven Roth ’77

Location: Morgan, Brown, and Joy LLP
200 State Street, 11th Floor
Boston, MA 02109

Revised January 14, 2012
### Wednesday January 25, 2012

**11:00 am**  
*Venture Capital*  
John Shane P90 (Palmer Services)  

Location:  
2 Commonwealth Avenue  
Boston, MA  

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### Thursday January 26, 2012

**3:30 pm**  
*Dr. Anthony Stallion*  

Location:  
Stevenson Hall  
Oberlin, OH