ACCELERATE EXTERNSHIP

aaaim

2025

Program Overview

Accelerate is an interactive and hybrid initiative tailored for AAPI and diverse undergraduate college students interested in investment management and finance. Geared towards accelerating students' overall professional journey, the initiative focuses on developing skills necessary for networking, pursuing internships, and actively preparing for entry into the workforce.

Established in 2023, the Accelerate Externship is an intensive, 7-day hybrid program in the summer, offering 30 undergraduate college students an experiential learning and mentorship opportunity. The program provides externs with a structured curriculum, industry exposure, and mentorship as they navigate the world of investment management. Through virtual sessions and a trip to New York City, externs gain valuable insights from industry leaders and professionals, develop career-ready skills, and build networks that will support them into the workforce.

AAAIM emphasizes supporting underrepresented students with target goals of:

- 50% First Generation students;
- 50% enrolled in non-target schools;
- 70% utilizing financial aid or assistance.

The 2025 Externship took place from Monday, August 4th through Friday, August 8th with a virtual program, and concluded with an in-person program starting the evening of Monday, August 11th through Wednesday, August 13th in New York City.

Thank you to everyone who generously contributed to the program through the 2025 Lunar New Year Gala and program sponsorship. We also thank our nearly 80 speakers, 9 in-person hosts, 30 mentors, and the Accelerate Externship Committee for making the 2025 Externship possible!

PROGRAM IMPACT
*Year-to-Date Highlights**

**Accelerate was established in 2023 and has successfully run three externships. The highlights capture the combined impact of three years.*

Externs represented **42** universities and colleges across the U.S., with **47%** enrolled in non-target schools	**90** undergraduate students have participated in the Externship, gaining essential skills and career readiness
46% of externs identify as women, underscoring our commitment to gender representation	**70%** of externs benefit from financial aid or scholarships, reflecting our focus on supporting students from modest income families
Over **100** industry leaders & professionals have shared their unique journeys, offering invaluable insights into the industry	**90** AAAIM members have generously contributed their time and expertise as mentors

Extern Class of 2025

Anderson Ahn
Emory University

Dhwani Amin
Northeastern University

Brianna Busse
University of California, Los Angeles

Tracy Cao
Emory University

Jackie Chen
University of Pennsylvania

Jarrett Chen
University of Chicago

Jonathan Chen
New York University

Canon Chiu
University of Notre Dame

Ben Fan
University of Southern California

Nhan Han
Lewis & Clark College

Dylan Hsueh
University of Chicago

Mahi Jaiswal
Rutgers University

Eunice Kang
Wellesley College

Faiyaz Khan
Baruch College

Rachel Kim
University of Pennsylvania

Bailey Klein
Indiana University

Kai Lee
Washington University of St. Louis

Catherine Ling
University of Georgia

Emily Nguyen
Columbia University

Bao Nguyen
Indiana University

Samantha Pincus
Smith College

Cole Smith
University of Southern California

Riya Thakkar
DePaul University

Andy Tran
Tufts University

Junie Weng
Baruch College

Rick Yang
Harvard University

Jason Zhao
Columbia University

Derek Zheng
New York University

Mandy Zheng
DePaul University

Alex Zou
Georgia State University

Monday August 4th

11:00 - 12:00 PM — Meet & Greet and Orientation

1:00 - 2:00 PM — Accelerate Externship Alumni 2024

- **Andrew Dinh**, Junior, Occidental College
- **Amy Kim**, Business Analyst in Private Capital, McKinsey, Emory University Alumna
- **Nate Kim**, Associate Consultant, Bain & Co., Williams College Alumni
- **Cinly Mo**, Junior, Columbia University

2:00 - 3:00 PM — Team Building

3:00 - 4:30 PM — Investment Management 101: Asset Class Overview

- **Jerilyn Castillo McAniff,** Managing Director and Head of Diversity and Inclusion, Oaktree Capital Management
- **David Sheng**, Managing Director, Aksia

Tuesday August 5th

11:00 - 12:00 PM — Session I: Professional Journeys

- **Lisa Feng,** Investment Analyst, Spider Management
- **Katie Ko,** Associate, Ripple Ventures
- **Lilly Liu,** Quant Research Analyst, Emerging Markets Equities, AllianceBernstein
- **Pranav Ahluwalia,** Analyst, Portfolio Tools Engineering, Equity Alternatives, Acadian Asset Management

12:30 - 1:00 PM — Team Building

2:00 - 3:30 PM — Session II: Professional Journeys

- **Imran Bora,** Founder and CIO, BrightSpring Investment Advisors LLC
- **Carty Chock,** Co-founder and Partner, ClearPoint Investment Partners
- **JingLin Huang,** Director, Private Market Investments, Segal Marco Advisors
- **Pamela Yu,** Senior Vice President, Artemis Real Estate Partners
- **Chris Zhao,** Vice President, Amateras AEA

4:00 - 5:00 PM — Investment Management 101: Financial System - Flow of Capital

- **Kevin Dinh**, Director of Marketing and Investor Relations, Tensile Capital Management
- **Drew O'Hearn**, Head of U.S. Account Management, Cerulli Associates

Wednesday August 6th

11:00 - 12:30 PM — Session III: Professional Journeys
- **Sarie Diloné,** Vice President, Alternatives Consulting, Callan LLC
- **Linda Luu,** Managing Director, Blackstone
- **Sean McCorry,** Managing Director, Head of Capital Solutions Credit Strategies, General Atlantic
- **Scarlett Jia Tames,** Vice President, Clear Capital
- **Stanley Yu,** Principal, Leonard Green & Partners

1:30 - 2:30 PM — Investment Management 101: Institutional Investors and Private Wealth
- **Harisha Haigh**, Managing Director, Northwestern University
- **Caixia Ziegler**, Managing Director, MacArthur Foundation

3:00 - 3:30 PM — Team Building

4:00 - 5:30 PM — Session IV: Professional Journeys
- **Ray Chan,** Senior Managing Director, Blue Owl Capital
- **Akshay Gupta,** Portfolio Manager, Nipun Capital
- **Hannah Jang,** First Vice President, Wealth Management Advisor, Merrill Lynch
- **Anita Patel,** PWM Business Development Director, Morgan Stanley Private Wealth Management
- **Brent Tasugi,** Managing Director, I Squared Capital

Thursday August 7th

11:00 - 12:00 PM — Talent in the Workforce - Resumes and Recruitment with KKR
- **Annie McMullen**, Principal, Head of Campus Recruiting, KKR

1:00 - 2:30 PM — Elevating Your Pitch for Networking
- **Rebecca Rosen**, Vice President, Acadian Asset Management
- **Joy Sun**, Assistant Vice President, Talent Acquisition, TCW

3:30 - 4:30 PM — Understanding Your Cultural Values
- **Elaine Chiu,** Program Manager, Leadership Education Asian Pacifics (LEAP)

5:00 - 5:30 PM — Interview Tips and Tricks
- **Prachi Bansal,** Principal, Ares Management
- **Eric Tang,** Principal, Ares Management

Friday August 8th

11:00 - 12:00 PM	Words of Wisdom from AAAIM Senior Leaders • **Linda Choi**, Chief Operating Officer, Kabouter Management • **Paul Hayama,** Senior Partner, Avante Capital Partners • **Victor Hu,** Cofounder and Managing Partner, Lumos Capital Group • **June Kim,** Senior Investment Director, California State Teachers' Retirement System • **Johnny Wu,** Founder and CEO, WallStreet X ETFs
1:00 - 2:15 PM	Financial Literacy 101 • **Lindsey Stanberry,** The Purse, Founding Editor of Refinery29 Money Diaries
2:30 - 4:00 PM	Closing + NYC Overview

Monday August 11th

6:30 - 9:00 PM	Extern Meet & Greet + Team Bonding @ Puttery, NYC

Tuesday August 12th

8:00 - 9:00 AM	Kennedy Lewis Investment Management
9:30 - 11:00 AM	Goldman Sachs
1:30 - 1:00 PM	GCM Grosvenor
1:15 - 2:30 PM	BTIG
3:00 - 4:30 PM	Split Sessions • Belveron Partners • Morgan Stanley • Oaktree Capital Management
6:30 - 9:30 PM	Externship Dinner

Wednesday August 13th

9:00 - 10:30 AM	KKR
11:00 - 12:30 PM	Marathon Asset Management
1:00 - 2:30 PM	Farewell Lunch

Extern Reflections - 2025

"This program has been a transformative experience and has given me the confidence as a non-traditional candidate to put myself out there! What I learned and found unique to finance is that your story is integral to your brand as a professional. From the extern alumni panel to our last lunch with the cohort, every session has been so impactful."
– Rachel Kim, University of Pennsylvania

"The AAAIM Accelerate Externship was an incredibly empowering experience. It not only gave me direct exposure to top firms in investment management but also connected me with a community of supportive peers and leaders who are paving the way for greater representation in finance. I walked away with new skills, confidence, and a stronger sense of belonging in the industry."
- Nhan Han, Lewis & Clark College

"The AAAIM Accelerate externship was a very valuable experience where I gained a deeper understanding of the finance industry alongside like-minded peers. Hearing directly from the perspective of Asian American professionals about their challenges and successes in their career gives me the confidence to excel in this field. These individuals are not only extremely knowledgeable about the finance industry and their role, but are willing to build mentorship with us to help us succeed. I am forever grateful for this experience that warmly welcomed me to a supportive community of Asian American finance professionals that I will keep in touch with throughout my career. "
- Samantha Pincus, Smith College

"The AAAIM Externship experience has allowed me to develop critical soft skills and connect me with industry leaders at prestigious banking institutions. Lifelong connections, mapping out financial career paths and using culture as a strength, AAAIM beautifully executes on giving Asian Americans the opportunity to succeed in business."
- Canon Chiu, University of Notre Dame

Welcome AAAIM
Accelerate 2025
Externs!
Goldman Sachs Asset & Wealth Management Asian Network

BELVERON
PARTNERS