

Finance & VC Overview for OP

Bill Rindfuss, Financial Services Relationship Manager

Abby Franklin, IB Career Advisor & Real Estate RM

Deepak Gupta, VC & Startups Career Advisor

Anthony Magno, MBA '26

Hayden Estes, MBA '26



Anthony Magno '26 *(he/him)*

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- **PreHaas:** Associate @ Goldman Sachs, Product Manager @ Apollo, Corporate Strategy @ Ares
 - **Summer Internship:** In-semester Intern @ Illuminate Ventures
 - **Recruitment Strategy:** Monitor CMG Bears and VC Jobs Slack channel, networking on LinkedIn
 - **Ask me about:** Working at the intersection of Finance and Technology, exploring careers within Finance and Technology, recruiting for Finance/VC



Hayden Estes '26 *(he/him)*

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- **PreHaas:** Director, Accounting (CPA)
 - **Summer Internship:** Director, Accounting @ Kellermeyer Bergensons Services
 - **Recruitment Strategy:** LinkedIn-message Haas Grads: “What is an unforgettable class you took at Haas that I should look into?”
 - **Ask me about:** Finance Classes, Real Estate, Accounting, Berkeley Neighborhoods, Working while in the MBA program, Haas Treks

Consortium Corporate Partners: Financial Services

PIPER | SANDLER

Morgan Stanley

WELLS
FARGO

Bank of America


Harris Williams



Vanguard®



M&T Bank

BerkeleyHaas



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The World of Finance (according to Haas)

Investment
Banking

Public
Markets
Investing

Entrepreneurial
Finance (i.e. Venture
Capital, Impact
Investing & Fintech)

Corporate
Finance within
Industry

Real Estate Private
Equity and Finance

There are 20+ renowned Banks in the Bay - Of those, 14 recruit on campus¹

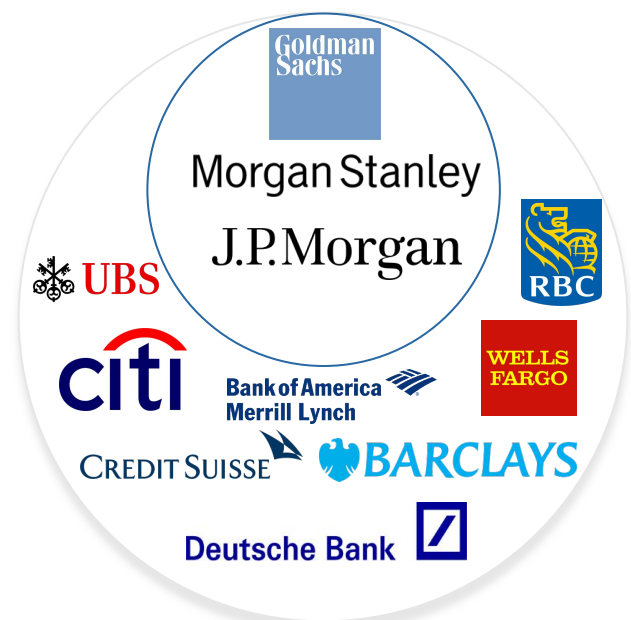


#	Bank	Location	Industry	Recruits at Haas?	Spots for Haas ¹	Spots for summer
1	JP Morgan	SF	Tech, HC	Yes	1-2	5-8
2	Barclays	Palo Alto	Tech	Yes	0-1	4
3	Citi	SF	Tech, HC	Yes	1-2	3-4
4	Credit Suisse	SF	Tech, HC	Yes	1-2	3-4
5	Goldman Sachs	SF	Tech, WRA	Yes	0-1	3-4
6	William Blair	SF	Tech, Sponsors	Yes	1-2	4
7	PWP	SF	Tech, HC	No	0-1	3
8	Greenhill & Co.	SF	Tech, Sponsors	Yes	0-1	3
9	Moelis & Co.	SF	Tech	Yes	0-2	2-3
10	BAML	Palo Alto	Tech	No	0-1	2-3
11	Morgan Stanley	Palo Alto	Tech	No	0-1	2-3
12	Lazard	SF	Tech	Yes	0-1	2
13	Evercore	Menlo Park	Tech	Yes	0-1	1-2
14	Morgan Stanley	SF	WRA	Yes	0-1	1
15	Deutsche Bank	SF	Tech, HC	Yes	0-1	1-2
16	Wells Fargo	SF	Tech	Yes	0-1	1-?
17	Qatalyst Fargo	SF	Tech	No	0	1-2
18	Houlihan Lokey	SF	Tech	No	0	1-?
19	Jefferies & Co.	SF	Tech	No	0	1-?
20	UBS	SF	Tech	No	0	1-?
21	RBC	SF	Tech	No	0	1-?
22	Piper Jaffray	SF	Tech	Yes	0	1-?

There are many more boutique firms in addition to the ones listed here²

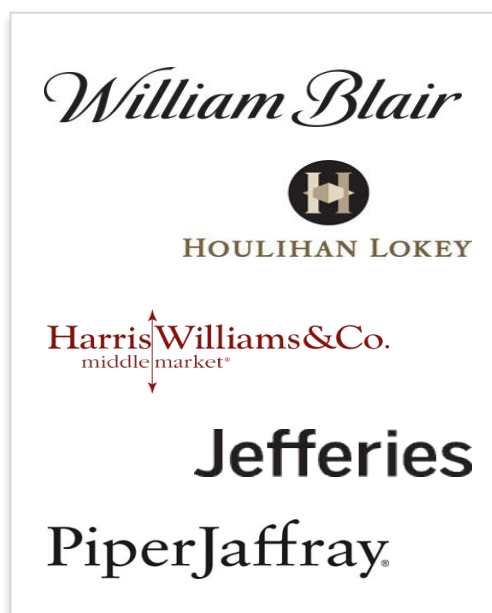
Banks are divided in Bulge Brackets, Middle-market and Boutiques (Independent Advisors)

Bulge Bracket Banks



- Big Banks
- Provide all the services an Investment Bank can provide
- Usually have an international footprint
- Big balance sheets
- Deals from 100MM to multi-billion

Middle-market



- Deals from 50 to 600MM
- Sometimes do not provide all the services an IB can provide
- Strong deal flow from Private Equity (PE) firms

Boutique firms



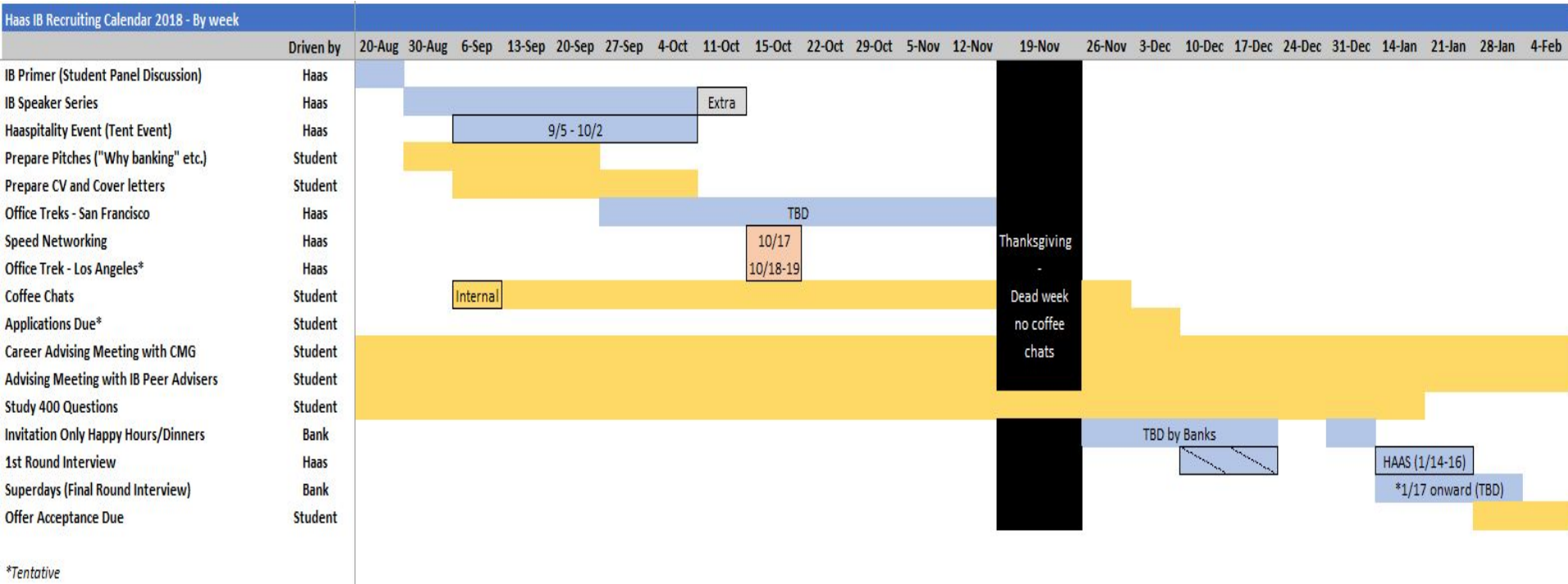
- Purely advisory firms
- Only do M&A¹
- Strong brand recognition in the industry
- Deals from 50MM to multi-billion

4 Functions of Investment Banking

	What they actually do	Which banks do this	Related Lingo
Help SELL Companies	<ul style="list-style-type: none">• Price the company• Prepare marketing materials• Reach out to buyers• Fill out fillings	<ul style="list-style-type: none">• Bulge brackets• Boutiques• Middle-market banks	Sell side M&A
Help BUY Companies	<ul style="list-style-type: none">• Price the target company• Determine best way to pay for the company• Fill out fillings	<ul style="list-style-type: none">• Bulge brackets• Boutiques• Middle-market banks	Buy side M&A
Help UNDERWRITE IPOs	<ul style="list-style-type: none">• Prepare marketing materials• Assess market interest• Price the stock• Sell shares• Fill out fillings	<ul style="list-style-type: none">• Bulge brackets• Boutiques (less common)• Middle-market banks (less common)	ECM – Equity Capital Markets
Help RAISE debt	<ul style="list-style-type: none">• Prepare marketing materials• Assess market interest• Price the debt• Fill out fillings	<ul style="list-style-type: none">• Bulge brackets• Middle-market banks (less common)	DCM – Debt Capital Markets Leveraged Finance

Example: Haas IB Recruiting Roadmap

***NOTE: timelines are tentative**



- This Roadmap should be used as guidance in understanding what you should be doing when
- The dates shown reference the week, not the actual date of the events/deadlines
- Double check all dates and don't rely on this for mission critical dates

Example: Investment Pitch Competitions

***NOTE: timelines are tentative**



Projected Date	September / October	October	November	November	November	December
Participants Requirements	Open to all	Open to all	Open to all	Women's Competition	Open to all	Open to all
Industry / Details	SM, MD, LG Equity	TBD	SM, MD, LG Equity	SM, MD, LG Equity	Credit	SM, MD Equity

Venture Capital Resources

- [Venture Capital Industry Page](#)
- [CMG BEARS](#) Appointments with Deepak Gupta or email Bill Rindfuss
- [VC Related Fellowships](#)
- [Haas Venture Capital Club](#)
- [Begin.berkeley.edu](#) (Berkeley Venture Capital and Entrepreneurship)
- [Courtyard Ventures](#)
- [Entrepreneurship and Academics at Haas](#)
- [Sand Hill Prep](#)