



**Gabriella Garr, Portfolio Management Group  
New York**

#### **What is your alma mater and major?**

I am a graduate of Princeton University with an A.B. degree in the History of Art and a Certificate in Spanish Language and Culture.

#### **How did your major help prepare you for your role here at Hall Capital?**

My studies in the History of Art trained me to think critically and broadly. The ability to research and synthesize vast amounts of information has been a valuable tool in my position as an Analyst at Hall Capital.

#### **How did you hear about the opportunity here?**

I was aware of Hall Capital's extraordinary reputation, and I discovered the Analyst position through the firm's website.

#### **What was your motivation for accepting the position?**

I felt the position presented the kind of intellectual challenge and opportunity for professional development I was looking for. I was excited to gain exposure to a broad range of asset classes and strategies and learn how they fit into different client portfolios. Further, I was impressed with the engaging people I met throughout my interview process and believed that Hall Capital was the kind of organization I wanted to be a part of. My experience at Hall Capital has exceeded my expectations.

#### **What does a typical day look like for you?**

A typical day involves the use of both hard and soft skills. I spend part of my day working with client data to produce reports that provide performance information and aid in the process of making investment decisions with clients. This task requires attention to detail and critical thinking skills. I also spend time communicating with clients to respond to questions or specific requests.

#### **What experience has made the greatest impact since being at Hall Capital Partners?**

I have had the opportunity to work with a client that was new to Hall Capital. While it can be challenging to work from the ground up, I have enjoyed seeing how the Portfolio Manager thinks about building a new portfolio, and I take pride in the materials I have produced on my own.

#### **How do you see this role helping you achieve your future career goals?**

The exposure I have received to a range of strategies and client portfolios has helped me think through my more specific interests. I have also been given valuable training and mentorship to help build a strong technical and professional foundation, which I will certainly be able to carry forward.

#### **What skill(s) have you learned in the role that will help you in the future?**

The sound critical thinking, leadership, and communication skills I have gained at Hall Capital will continue to serve me well going forward. For example, I have had the opportunity to research and present to colleagues on topics of specific interest to me. These skills are very transferrable no matter what future career decisions I make.

#### **How would you describe the culture at Hall Capital?**

Our firm greatly values mentorship, and our culture fosters growth and leadership. We also emphasize intellectual curiosity and development. Starting at the Analyst level, one is encouraged to ask questions and come up with new ideas and solutions.

#### **What is one word you would use to describe your experience here at Hall Capital?**

Enriching.

**“The exposure I have received to a range of strategies and client portfolios has helped me think through my more specific interests. I have also been given valuable training and mentorship to help build a strong technical and professional foundation.”**



## Shaquille Bent, Portfolio Management Group New York

### What is your alma mater and major?

I graduated from Buffalo State College, The State University of New York, with a major in Industrial Technology with a concentration in Quality Assurance.

### How did your major help prepare you for your role here at Hall Capital?

My coursework in Industrial Technology contributed to the enhancement of my meticulous and planning characteristics. The Portfolio Management Group Analyst role requires thoughtful planning and it is advantageous to be able to think multiple steps ahead. My Quality Assurance concentration helped develop my attention to detail which is crucial as a PMG Analyst, especially when it comes to delivering high quality material to clients.

### How did you hear about the opportunity here?

I once attended a networking event and was introduced to an employee of Hall Capital, who previously studied engineering as an undergrad, which fascinated me. I expressed my interest in pursuing a role in the finance/investment industry though I did not have a traditional background, and the employee recommended I apply due to the unique nature of Hall Capital Partners' recruiting from various backgrounds.

**"The culture at Hall Capital provides an enriching and inclusive experience to the employees of the firm. There is a tremendous focus on growth."**

### What was your motivation for accepting the position?

Aside from Hall Capital Partners' prestigious reputation, when I became aware of the interest Hall Capital Partners had in hiring me, it was extremely enticing since I did not have a traditional finance background. That gesture revealed that they are willing to invest in their new employees and that alone motivated me to accept the offer.

### What does a typical day look like for you?

My day-to-day experience at Hall Capital Partners can vary greatly. A majority of time is allotted towards developing high-quality quarterly and monthly reports for clients, aggregating and tracking data and coordinating estate planning transactions. I serve as a mentor for incoming interns and new analysts, help coordinate firm-wide external activities and host workshops which serve as ongoing training for analysts.

### What experience has made the greatest impact since being at Hall Capital Partners?

I was invited to have breakfast with Katie Hall, the Founder of the firm. I had been working at the firm less than two years at the time, so the fact that I was selected to have breakfast with Katie proved to me that she considers everyone at the firm valuable. I found it impressive that she allots time to learn about the employees of HCP.

### How do you see this role helping you achieve your future career goals?

As an Analyst of the Portfolio Management Group, I have had the opportunity to gain exposure to the wide array of asset classes and investment strategies. This exposure has piqued my interest in specific areas which will allow me to pursue future opportunities, whether it be through graduate programs, employment or entrepreneurship.

### What skill(s) have you learned in the role that will help you in the future?

I have learned the importance of providing high-quality service cannot be replaced with any other product/service. Though there are many existing investment advisors, the employees of Hall Capital Partners make it their mission to go above and beyond to provide clients with the best service possible, which is also woven into Hall Capital Partners' culture. That service satisfies our current clients and helps generate new business.

### How would you describe the culture at Hall Capital?

The culture at Hall Capital provides an enriching and inclusive experience to the employees of the firm. There is a tremendous focus on growth and creating opportunities outside of your designated "role." There is a huge team-oriented spirit and everyone is accessible no matter the seniority level.

### What is one word you would use to describe your experience here at Hall Capital?

Captivating.



## **Madison Fisher, Portfolio Management Group New York**

### **What is your alma mater and major?**

I graduated from Georgetown University with a major in Economics and a minor in Psychology.

### **How did your major help prepare you for your role here at Hall Capital?**

Through my economics major I developed skills that helped prepare me for the Analyst role at Hall Capital, such as problem solving and attention to detail. Separate from my major, I also played Lacrosse at Georgetown throughout college. The skills that I learned from Lacrosse, including teamwork, proved invaluable at Hall Capital where we work in client teams every day.

### **How did you hear about the opportunity here?**

I found the Portfolio Management Group internship position through Georgetown's career website.

### **What was your motivation for accepting the position?**

I was interested in pursuing Investment Management. The internship at Hall Capital was appealing because it provided an opportunity to learn about multiple asset classes and work on a broad range of client relationships. As an intern, I enjoyed the work, was impressed by the people, and appreciated Hall Capital's welcoming and team-oriented culture. Once I received a full-time offer at the conclusion of the internship, I was excited to accept and return as an Analyst the following year.

### **What does a typical day look like for you?**

Day-to-day work varies. Most of my time is spent aggregating and entering data that will be used to construct reports such as balance sheets, asset reconciliations, and performance pages. These reports will ultimately be sent to our clients, but portfolio managers also use them to review portfolios. In addition to reporting, other time is focused on correspondence between clients and third parties, investment paperwork, or ad hoc projects. No day is quite the same.

### **What experience has made the greatest impact since being at Hall Capital Partners?**

Attending client meetings has made the greatest impact on me. There is a ton of work that goes into preparing for a client meeting. To be able to experience firsthand your teams work being used in meetings is extremely rewarding, especially when a client makes a positive comment about the reports!

### **How do you see this role helping you achieve your future career goals?**

Hall Capital offers broad exposure to multiple asset classes, which has helped me explore different interests and start to outline my career goals.

### **What skill(s) have you learned in the role that will help you in the future?**

From working on seven client teams, there is usually multiple projects ongoing at a given time. I have learned prioritization skills that have helped me navigate what projects to focus on and meet deadlines. In addition, there is constant communication between client teams, portfolio managers, and clients or third parties. Communication has been essential in order to effectively and efficiently complete projects. The communication and prioritization skills that I have developed at Hall Capital will be applicable to any future profession.

### **How would you describe the culture at Hall Capital?**

Team oriented, collaborative, and open. Our firm motto is "use good judgment" (we even have a sign hanging up in our kitchen!) and all colleagues, from Analysts to Managing Directors, exemplify this. Hall Capital is unique in that everyone genuinely wants you to succeed, learn, and grow.

### **What is one word you would use to describe your experience here at Hall Capital?**

Enlightening.

**"Hall Capital is  
unique in that  
everyone genuinely  
wants you to succeed,  
learn, and grow."**



## Frank DiMartino, Portfolio Management Group San Francisco

### What is your alma mater and major?

I graduated from Boston College with a double major in Economics and Philosophy.

### How did your major help prepare you for your role here at Hall Capital?

A large portion of the analyst role is understanding how to troubleshoot various problems, whether they be thinking through our geographic and sector exposure across investments, tracking historical performance, or responding to ad-hoc client inquiries. To succeed, you need to be able to think critically from multiple viewpoints and constructively engage with your teammates. My quantitative experiences working on economic models, and qualitative experiences debating various philosophers while at BC, definitely helped provide me with a solid foundation to succeed in tackling such conversations and inquiries.

### How did you hear about the opportunity here?

I first heard about Hall Capital Partners through my friend and fellow BC grad, Erica Ursin-Smith, who is an Associate on our Research team. Through conversations with Erica and numerous others with whom she helped to connect me, I quickly gained an appreciation for the incredible culture and prestige of Hall; I couldn't wait to send in my application.

### What was your motivation for accepting the position?

I was particularly excited about the client relationship aspects of being in PMG. Additionally, I knew that the role would both challenge me intellectually and provide an outlet to engage directly with individuals at all level of the Firm. The opportunity to move to San Francisco (and away from Boston winters) didn't hurt either.

### What does a typical day look like for you?

It is cliché to say it, but no two days are the same; however, there are certainly overarching themes and responsibilities. From creating performance analyses, to managing inquiries from clients and/or their family offices, to attending investment committee meetings, an analyst in PMG is engaged with all aspects of the portfolio management process.

### What experience has made the greatest impact since being at Hall Capital Partners?

One of the client relationships that I am on is in the process of building out a new investment entity from the ground up. Through this, I have had the chance to work directly with my Portfolio Managers to understand their investment objectives, outlook on managers, and create various investment analyses to better gauge the portfolio construction. It has been a very enriching and intellectually-challenging team to work on, and I think a great example of the way in which senior members of the Firm truly welcome input from junior folks.

### How do you see this role helping you achieve your future career goals?

The network that I have developed at Hall will undoubtedly play an outsized role in the next chapters of my career. I am surrounded by so many brilliant and intellectually-curious individuals with myriad career experiences prior to Hall Capital, and I continue to learn from them every day. I know that whatever the next step is (likely business school), I will lean heavily on these relationships for advice and support.

### What skill(s) have you learned in the role that will help you in the future?

Client service, a deeper appreciation for the markets, the ability to adapt on the fly, and synthesizing narratives from large pieces of data.

### How would you describe the culture at Hall Capital?

I never dread coming into the office on a Monday morning, even if I have a hectic week ahead filled with meetings and deliverables due in seemingly every direction. I owe that to the incredible people I get to call colleagues and friends. The concept of an open-door policy has become a bit of a buzzword, but it is something that truly permeates throughout the entire office. This open culture encourages you to take ownership of your work and challenges you to have the confidence to think critically for yourself.

### What is one word you would use to describe your experience here at Hall Capital?

Collaborative.

**“The network that I have developed at Hall will undoubtedly play an outsized role in the next chapters of my career.”**



## **Maria Lim, Portfolio Management Group San Francisco**

### **What is your alma mater and major?**

I attended Boston University and graduated with a degree in Business Administration with a double concentration in finance and management information systems.

### **How did your major help prepare you for your role here at Hall Capital?**

My time at BU studying business allowed me to experience working closely with small teams of people for extended periods of time. Majoring in finance equipped me with fundamental understanding of the markets, yield-curve movements, and asset classes. This knowledge enables me to participate and learn from investment discussions at HCP. Management information systems prepared me with a framework for how code logic works – a critical skill when troubleshooting my Excel book during reporting season!

### **How did you hear about the opportunity here?**

I discovered Hall Capital Partners through my BU's business school job recruiting website.

### **What was your motivation for accepting the position?**

The people! When coming in for my first interview, I was blown away at the close-knit community I saw between everybody during lunch. This culture carries over to the long-standing relationships we have with our clients, which was another initial driver of my interest in PMG.

### **What does a typical day look like for you?**

My typical day consists of communicating with client family offices to coordinate investment activity. When I am not working on various client requests, I am working on producing quarterly reports and materials for my client teams. This is a process that requires both a high level of detail, and the ability to think about how simple financial concepts work in practice.

### **What experience has made the greatest impact since being at Hall Capital Partners?**

The openness and genuine interest that everyone at the firm has both in you, your growth, and in learning about new things! The mentorship and guidance that is available at HCP is invaluable. Spending my day getting to know great people and learning from their experiences makes coming to work every day exciting.

### **How do you see this role helping you achieve your future career goals?**

The analyst role at Hall has provided me with a general understanding of wealth management, and how our values and beliefs translate to how we build out a portfolio. Through my clients, I have been able to learn more about estate planning in relation to how we think about investing – something that I would be interested in pursuing in the future.

### **What skill(s) have you learned in the role that will help you in the future?**

After moving on from Hall Capital, I am confident that I will have the skills to communicate well with people – internally and externally – which will translate well to any job! Additionally, I believe that the greater understanding of asset classes and how they can be complimentary to each other will allow me to think about things more critically on a high level.

### **How would you describe the culture at Hall Capital?**

The culture at HCP is collaborative and supportive. There is always an opportunity for you to speak up and give your perspective to people who care to listen and value your voice. Everybody works hard and is motivated to do and be better, both in work and as individuals.

### **What is one word you would use to describe your experience here at Hall Capital?**

Supportive.

**“There is always an opportunity for you to speak up and give your perspective to people who care to listen and value your voice.”**



## Rohan Ugale, Portfolio Management Group San Francisco

### What is your alma mater and major?

I graduated from Emory University in Atlanta, Georgia, with a double major in Finance and Political Science.

### How did your major help prepare you for your role here at Hall Capital?

My quantitative coursework in business administration, finance, and accounting was helpful to contextualize the work we do at Hall Capital. The business program also taught me how to work effectively in a team environment, build soft-skills, and be a professional in the workplace. Meanwhile, my political science courses challenged me to take a view on various topics and defend them, forcing me to become a better writer, critical thinker, and presenter. Striking the balance between the qualitative and quantitative is key to the analyst role.

### How did you hear about the opportunity here?

I found the opportunity on Emory's career portal and I reached out to an alumnus to learn more about the role. After the initial conversation, I knew I was interested in the opportunity to join the Portfolio Management team.

### What was your motivation for accepting the position?

Prior to Hall Capital, I had a few internships in the alternative investments space focused on private equity and venture capital, but I never had the opportunity to think about how different types of investments fit together in a single portfolio. The role at Hall gave me the opportunity to take a step back as a generalist and think more broadly about today's investment landscape and the markets. On top of that, I was thoroughly impressed with everyone I met in the interview process and was excited about the opportunity to work with them.

### What does a typical day look like for you?

My core day-to-day responsibilities are bucketed into client-oriented work and investment reporting. The prior focuses on assisting clients execute investments, transactions, and special projects. Meanwhile, the latter consists of preparing comprehensive, bespoke client reports, summarizing investment performance and cash flow activity. Additionally, I work on both the Analyst Training and Summer Intern teams.

### What experience has made the greatest impact since being at Hall Capital Partners?

The frequency with which I get to meet and speak with our senior portfolio managers and clients has been a very rewarding part of my experience. These conversations often spark new opportunities, whether it is a new type of analysis, deep-dive, or client project. I have been lucky enough to be on a handful of very involved relationships that have challenged my time management, multi-tasking, Excel, and problem-solving skills daily.

### How do you see this role helping you achieve your future career goals?

Whether I decide to go back to school for an MBA, another career in the finance space, or a completely different industry, I feel confident that the skills I am building at Hall Capital will prepare me to be a well-rounded and skilled individual. As the junior-most people, analysts are the first to take on new challenges that bring out our creativity and critical-thinking skills. The firm's smaller size and its inclusive culture make it seamless to seek mentors, who are valuable resources in thinking about the future.

**“The people at Hall are incredible, creating an inclusive, progressive, and respectful-yet-collegial environment.”**

### What skill(s) have you learned in the role that will help you in the future?

On the finance side, the analyst role helps you understand a wide array of investments. Reading manager letters and market overview materials has helped me plug into the investments universe and become more intellectually curious about various strategies our managers pursue. However, many of the skills I have honed here are applicable to a multitude of career paths, such as attention to detail, time management, adapting to various working styles, teamwork, and presentation skills.

### How would you describe the culture at Hall Capital?

The people at Hall are incredible, creating an inclusive, progressive, and respectful-yet-collegial environment. It is easy to get access to senior management and they are truly interested in getting to know you and hear your thoughts on the business. The firm has an innovative culture, and many of the new firm initiatives have focused on bolstering our technology and operational prowess, which shows when you speak with the highly knowledgeable people in our Investment Operations, Data Operations, and Research groups.

### What is one word you would use to describe your experience here at Hall Capital?

Engaging.



**Nicole Benun, Investment Research  
San Francisco**

**What is your alma mater and major?**

University of California at Berkeley, B.S. Industrial Engineering and Operations Research.

**How did your major help prepare you for your role here at Hall Capital?**

My major was heavily focused on statistics and optimization in business decisions, which I initially viewed as minimally relevant to investment research. However, many aspects of my education have applied to investing, such as rigorous and deliberate decision-making processes driven by both quantitative and qualitative perspectives. In general, the ability to take notes, synthesize conversations, and present my findings to a group have all been highly transferrable from college to investment research, which requires evaluating many different types of opportunities and presenting these investments in a digestible format to clients.

**How did you hear about the opportunity here?**

I began my career at Hall Capital as an Investment Research Intern after coming across the opportunity via my school's career center.

**What was your motivation for accepting the position?**

I decided to join Hall Capital full-time after my 8-week internship based on the supportive and collaborative work environment, female representation and emphasis on diversity, and the ability to gain a wide-ranging education on the investment world from knowledgeable and approachable managers who respect and value my perspective and opinions.

**What does a typical day look like for you?**

A typical day in Research varies widely by asset class and role within each team. As a member of the Private Equity team, I attend 1-2 meetings each day with investment managers (both existing and prospective commitments), monitor deal activity in our existing investments, write investment theses and memorandums, and prepare custom presentation materials for client meetings. I've also been able to participate and contribute to several efforts outside of the Research group, including Diversity & Inclusion, Volunteering, Book Club, and Recruiting.

**What experience has made the greatest impact since being at Hall Capital Partners?**

I've had the opportunity to participate in the underwriting process as the lead analyst on two investment opportunities: a China-based growth-stage enterprise fund and a NY-based real estate technology venture fund. In both cases, I was in the initial meeting with each manager, completed quantitative performance analysis, prepared for diligence meetings, wrote the investment memos, presented the opportunity to our firm's Portfolio Managers, and was included in all discussions through the final investment decision.

**How do you see this role helping you achieve your future career goals?**

A main reason that I wanted to return to Hall Capital as a full-time analyst is the foundation that I knew this role would provide me in future endeavors, not only with regards to investment acumen, but primarily because of the opportunity to develop a full suite of professional skills ranging from presentation to writing to involvement in the broader firm.

**What skill(s) have you learned in the role that will help you in the future?**

I believe that I will bring to future jobs many "soft skill" learnings from Hall Capital that far outweigh the technical skills specific to my role. These learnings include developing strong conviction, an ability to voice thoughts clearly, working with colleagues at many different stages of careers, asking critical questions, and placing high value on partners over product.

**How would you describe the culture at Hall Capital?**

The fantastic firm culture is really set from the top down, from senior professionals who truly care about your goals and want to see you succeed, to the tremendous opportunities and responsibilities given to recent graduates.

**What is one word you would use to describe your experience here at Hall Capital?**

Intentional.

**“The fantastic firm culture is really set from the top down...senior professionals...truly care about your goals.”**



**Amber Shen, Investment Research  
San Francisco**

**What is your alma mater and major?**

I graduated from New York University with a major in Business and a minor in Computer Science.

**How did your major help prepare you for your role here at Hall Capital?**

My major provided me a basic understanding of how investing works. Hands-on work at Hall Capital Partners challenge me with new constraints and scenarios that were not taught at school.

**How did you hear about the opportunity here?**

I heard about this opportunity from LinkedIn. I always knew I wanted a role in Research. With a few more clicks on the internet, I became very interested in HCP because of its size. While the firm is not too big with 100+ employees, the work here has a global scope.

**What was your motivation for accepting the position?**

I was thrilled to accept the opportunity because I really enjoyed the interviewing process. From the interviews, it was just very apparent that people at HCP are interested to get to know you as a person, as opposed to how well you can do a DCF analysis.

**“Since the first week here, I have been given real tasks to work on. My day-to-day is very dynamic... There is really a good combination of technical and qualitative analysis in my role.”**

**What does a typical day look like for you?**

Since the first week here, I have been given real tasks to work on. My day-to-day is very dynamic depending on which managers are coming in to meet us or what is happening in the world. There is really a good combination of technical and qualitative analysis in my role.

**What experience has made the greatest impact since being at Hall Capital Partners?**

Up to now, the two-week training has made the greatest impact to me. Since all new analysts joining both in the New York and the San Francisco office come together, it was a great opportunity to get to know everyone. The training is also designed so that we immediately are able to meet and talk to a number of senior members working here. It was a great jump-start.

**How do you see this role helping you achieve your future career goals?**

Although I am not clear what my ultimate career goal will be, HCP is a great place for you to explore. I feel that everyone here is available to develop a mentor/mentee relationship. Moreover, the work that we do allows us to look at some of the smartest managers on the street. It really helps me gain a lot of perspective, preparing for whatever has to come.

**What skill(s) have you learned in the role that will help you in the future?**

I think one of the most important things I can learn here is how to talk intelligently with others about investments. Working here allows you to see how communication is done both with clients and with managers. This is a soft skill, but a necessary one for the future, especially if you plan to pursue a career in finance.

**How would you describe the culture at Hall Capital?**

People are very close with one another, oftentimes relationships extend beyond work and people become best friends outside of work. Working here is very enjoyable because on top of being professional, people know how to relax by being casual when need be.

**What is one word you would use to describe your experience here at Hall Capital?**

Supportive.





**William Johnson, Investment Research  
San Francisco**

**What is your alma mater and major?**

Dartmouth College and History.

**How did your major help prepare you for your role here at Hall Capital?**

Critical thinking and writing. Scholarship in history is based on looking at primary sources, thinking critically to connect various data points, and then combining those points into a concise argument. The same is true about my role in Cross Asset Research.

**How did you hear about the opportunity here?**

During talks with people in the financial industry, Hall repeatedly came up as a firm that I should take a look at for my summer internship. I was immediately attracted to the firm's reputation of developing and mentoring analysts.

**What was your motivation for accepting the position?**

I accepted the internship and returned full-time because I believed it was the perfect place to start my career. Few places offer the opportunity to have a wide view of the financial industry like Hall, and even fewer offer the degree of mentorship and development that Hall does.

**What does a typical day look like for you?**

My experience is slightly different than other analysts in the research department. As a member of the Cross Asset Research team, a typical day will consist of drafting reports for the firm and clients about macroeconomic and geopolitical developments, as well as assisting the other asset class teams.

**What experience has made the greatest impact since being at Hall Capital Partners?**

Preparing and presenting a project on Modern Monetary Theory. MMT is a complex and little-known economic theory that has emerged into the mainstream over the last few years. It was very rewarding to learn something and then be the lead person on a topic most people know little about.

**How do you see this role helping you achieve your future career goals?**

As someone with a liberal arts background, Hall Capital will help by exposing me to and teaching me about the broad landscape of investing. No matter what I decide to do next, Hall will have provided for me a great foundation for my career.

**What skill(s) have you learned in the role that will help you in the future?**

By the time I leave Hall Capital, I believe I will have a deep understanding in a wide array of investment fields, as well as the ability to do high-level financial research.

**How would you describe the culture at Hall Capital?**

Hall's culture is based around communal respect. From day one I felt like my voice was valued, which is very rare in this industry.

**What is one word you would use to describe your experience here at Hall Capital?**

Invigorating.

**“Hall’s culture is  
based around  
communal respect.  
From day one I felt  
like my voice was  
valued.”**