



**Bianca Rideout, Portfolio Management Group
San Francisco**

What is your alma mater and major?

San Jose State University and I majored in Business Admin/Entrepreneurship

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

My major helped me in my role by introducing me to how finance works and different finance terminology as well as the stock market. It also helped me build on my communication and problem-solving skills.

How did you hear about the opportunity here?

I heard about this role through Handshake when I received an email from an HCP recruiter

What was your motivation for accepting the position?

I was motivated to accept this position because I thought having multiple clients was exciting and looked forward to working on numerous teams. I was also motivated to accept this position because of the great company culture Hall Capital has and the opportunity for career growth

What does a typical day look like for you?

A typical day includes: Checking and responding to emails, whether that is the client office, accountants, internal emails, or the client themselves; interacting with the Investment Operations department when needing to coordinate money movement; working with the Data Operations departments when I am working on reporting and need data to be adjusted or added; working on different requests from the Portfolio Managers or from the client email inbox; working on client reports in preparation for the client meetings

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

Having the Portfolio Managers sit down and go over the investment recommendations as well as the monthly learning topics presentation has had the greatest impact since being at HCP

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

I think this role will help me achieve my future career goals by giving me the finance foundational tools such as portfolio construction, terminology, and market commentary.

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

Problem solving; Analyzing data; Organization; Team collaboration

How would you describe the culture at Hall Capital?

I would say the culture here at HCP is one of a kind. Rarely do you see a female founded company and have the opportunity to work for one. I have felt completely welcomed at Hall and feel as though I can show up as my authentic self. I also enjoy the different ERGs and DEI initiatives Hall has.

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

Educational.

“I would say the culture here at HCP is one of a kind. Rarely do you see a female founded company and have the opportunity to work for one. I have felt completely welcomed at Hall and feel as though I can show up as my authentic self.”



**Cameron Peyko, Portfolio Management Group
New York**

What is your alma mater and major?

I attended Connecticut College and graduated with a major in Psychology and a double-minor in Economics and Finance.

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

My major prepared me to be passionate about the relationships I would build at HCP. You never realize the different relationship styles you will have in your job until you are right in the middle of it all. Studying psychology in combination with economics and finance also allowed me to think critically about the intersection of these areas of study, especially during times of market volatility.

How did you hear about the opportunity here?

I found the position on LinkedIn.

What was your motivation for accepting the position?

Upon reading through the threshold attributes, I immediately felt a connection to HCP. Any firm can include a summary of their norms on their company site, but the HCP attributes truly applied to me, my experiences, and where I'd like to see myself in the next 5+ years. The culture at HCP is unlike that of its competitors, especially as a woman in finance. I was motivated by the many women in senior positions at the firm, which allowed me to envision where I could be later in my tenure.

“I have become more confident speaking in large groups and sharing my knowledge/opinions, as value is placed on every perspective.”

What does a typical day look like for you?

A typical day usually consists of check-ins with my client teams to discuss upcoming investment opportunities. Dependent on the time of year, I am working on client deliverables, whether that be a quarterly book or deck, along with one-off projects that allow me to collaborate with those outside of my direct client team, such as the Private Equity or Absolute Return teams. I am often in correspondence with clients, family offices, accountants, etc., through email or phone.

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

Within the last few months, I've had the opportunity to take a leadership role on one of my largest client teams, which is also one of the most important relationships at the firm. This has allowed me to step out of my comfort zone every week, whether that be leading our weekly check-ins or working on new projects for quarterly meetings. I built stronger relationships with my co-analysts, associates, and managers. This experience has encouraged me to seek innovative solutions to our daily tasks and provide exceptional client service.

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

Within my teams, I have exposure to a range of investing strategies, portfolios, and client relationships, which has opened my eyes to topic areas I never knew existed. The environment at HCP is one of constant learning and development; paired with mentorship, I have continued building the foundation to reach those goals I have set for myself. I have no doubt the connections I have made here will play a key role in my career goals.

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

I have learned about the immense importance of teams and collaboration. I have become more confident speaking in large groups and sharing my knowledge/opinions, as value is placed on every perspective. I have become a stronger leader while also learning the value of being a thoughtful listener.

How would you describe the culture at Hall Capital?

At Hall Capital, I feel that my personal goals are also the goals of my analysts, associates, portfolio managers, and other colleagues. Everyone wants to see you succeed and will do all in their power to support you along whatever path you take. There is no such thing as failure here, only growth, and that has encouraged me to strive for excellence in every task I undertake.

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



**Amanur Rahman, Portfolio Management Group
New York**

What is your alma mater and major?

I graduated from The City College of New York, with a major in Economics with a concentration in Finance.

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

Studying Economics and Finance gave me the fundamental knowledge about investments and the broader market. Being exposed to finance/investment courses enabled me to quickly adapt to HCP investment philosophy, understand fund manager strategies across asset classes, and engage in portfolio planning discussions. However, I will emphasize that an Econ / Finance background is not a pre-requisite to be successful in the role as all new analysts goes through a robust training process. Soft skills learned from part-time work experiences, and internships had a higher impact in preparing myself for this role.

How did you hear about the opportunity here?

I learned about Hall Capital from an information session I had attended and followed up with a coffee chat request with a presenter to learn more about the firm. I knew what I wanted from my first job out of college, and after my initial chat with an HCP employee, I knew this is where I wanted to be.

What was your motivation for accepting the position?

Interest in investment management, and an opportunity for personal & professional development. It takes years of experience and a lot of hard work to be a great investor. Thereby, I found the concept of being exposed to managing customized global multi-asset class portfolios an enticing opportunity.

What does a typical day look like for you?

No days are the same. As an analyst, most of my time is spent tracking portfolio performance, managing various client specific projects, managing inquiries from client / family offices, and producing periodical investment reports. As I mature in my role, I aid in portfolio planning and managing processes.

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

I found our senior managers to be very accessible to have conversations with and to learn from. I have many times set aside calendar blocks to talk through manager selection, portfolio planning and understand investment decision making. I found those conversations to be immensely helpful as I apply many of these learnings in my thinking process and while contributing in team meetings. I am also part of the training team, and a mentor to a new Analyst. Being able to contribute to the firm outside of my day-to-day scope and other's development is always a rewarding experience.

**“The communication,
time management,
and leadership skills
I have gained will
serve me well for
years to come.”**

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

The analyst role gave me the fundamental knowledge & experience in helping to manage multi-asset class portfolios for family & intuitional clients under a turbulent market. Being exposed to such an experience is a great foundation for whatever challenge I decide to take on next.

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

The communication, time management, and leadership skills I have gained will serve me well for years to come. Supplementing soft skills with a greater understanding of the investment landscape, and portfolio management will go a long way in any finance / investment role.

How would you describe the culture at Hall Capital?

I would describe the culture at HCP to be collaborative and supportive. The Associates and the Portfolio Managers are genuinely interested in what you have to say, care about your development and success. Analysts are encouraged to ask questions and raise any topic for discussions. Outside of the Portfolio

Management Group, we partner with other departments such as Investment Operations, Data Operations, and Accounting. I found the culture to be very consistent across departments and seniority level.

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

Enriching.



**Rafa Arimany, Portfolio Management Group
San Francisco**

What is your alma mater and major?

I graduated from Babson College with a double concentration in Entrepreneurship and Finance.

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

My courses at Babson College were heavily skewed towards an Entrepreneurship foundation. With this, I was trained to troubleshoot, streamline ineffective processes, identify bottlenecks, and find effective solutions to problems. Plus, being part of a startup in school gave me a foundation in teamwork and collaboration. These skills have not only been put to work here at HCP, but have been enormously refined too.

How did you hear about the opportunity here?

I first heard about the Portfolio Management Group Analyst position at HCP through Babson's Handshake portal, an online recruiting platform.

What was your motivation for accepting the position?

Before HCP, I completed several internships in the investment management space. It was always what I wanted to pursue. Moreover, after first learning about the position, I reached out to a tenured Associate at the firm, Eleni Spanos. We had in-depth conversations about the company and its wonderful culture as well as the role itself and how one is not only exposed to a wide variety of asset classes, but also expected to think creatively in order to propose sound investment decisions given the ever-shifting market environment. I knew HCP was the right place for me.

What does a typical day look like for you?

I know this may sound repetitive, but no day is ever the same here at HCP. My core responsibilities revolve around creating monthly and quarterly portfolio reports for our clients. These provide performance details and allocation specifics, such as asset class distribution, sector exposure, and geographic exposure. Furthermore, I manage client and family office inquiries which tend to vary significantly, but in the most part relate to investment planning, estate planning, and the execution of these. Lastly, I participate in the preparation of quarterly volunteer events for the firm as well as creating and presenting training materials to new Analysts.

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

I have had the opportunity to work alongside John Buoymaster, HCP's Co-Chair, in a couple of client teams. Being able to participate in meetings alongside him, as well as learning how he handles investment decisions, has been very special to say the least. It is rare to be part of a company that allows such exposure with senior individuals and I am very lucky to be part of one.

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

An Analyst at HCP is exposed to numerous client portfolios, investment vehicles, estate planning conversations, and detailed research materials. In addition, we attend bi-weekly Investment Committee meetings as well as a Quarterly Investment Review meeting led by our research division. Such conversations can be challenging, and as Analysts we practice critical thinking in order to understand the reasoning behind investment decisions during tumultuous (or prosperous) market environments, where we ultimately seek the protection of assets. This valuable investment foundation, as well as problem-solving skills, will be of great benefit regardless of whether I decide to pursue an MBA, stay in Finance, or seek a career in a different industry.

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

Working as an analyst in HCP has taught me how to be a great mentor, how to work well with a team, how to organize my time efficiently, and how to communicate my ideas in the best way possible. These are all skills that have made me not only a better professional, but a better person as well. Such life skills are malleable and can be easily applied in the future, regardless of what the future holds.

“I notice that everyone in the firm is willing to get out of their way in order to assist a coworker. Thus, great relationships are cultivated and teamwork becomes more effective. Simply put, HCP is a family.”

How would you describe the culture at Hall Capital?

During college, I completed several internships at a large bank's investment management division. It wasn't until I connected with people at HCP, including the individuals who interviewed me, when I realized how unique and wonderful the culture is here. Rather than being in constant competition with coworkers and ultimately building a toxic environment, the culture at HCP is the polar opposite. Success is pursued through collaboration, teamwork, and mentorship. From my experience, I notice that everyone in the firm is willing to go out of their way in order to assist a coworker. Thus, great relationships are cultivated and teamwork becomes more effective. Simply put, HCP is a family.

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

Fascinating.



**Stefano Watchi, Portfolio Management Group
San Francisco**

What is your alma mater and major?

I graduated from Duke University with a major in Economics and a minor in Arabic.

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

My quantitative background prepared me for the oftentimes number crunching nature of the PMG analyst role. Additionally, I learned to understand that resource allocation, a core economic concept, is central to portfolio construction. Most importantly, being in the know with macroeconomic trends has allowed me to better grasp the story behind the numbers we see in everyday reporting.

How did you hear about the opportunity here?

I previously worked in the financial technology space in sales, and Hall Capital Partners was a prospect of my previous company. After doing some research, I noticed Hall was hiring for PMG analysts and that someone who had attended a rival high school of mine worked there. I proceeded to direct message that person on LinkedIn to learn more.

What was your motivation for accepting the position?

I really enjoyed speaking with all my interviewers during my interview process. Everyone stressed the firm's emphasis on mentorship and open-door policy for junior level team members to learn from portfolio managers. Hall Capital's long-term investment philosophy, client retention, strong AUM growth, reputation in the RIA space, and multi-asset strategy made it easy to accept the position. My immediate impression of the culture made clear to me that HCP is not a "stepping over each other's toes" type of financial institution which I liked.

"Hall Capital is a tight-knit community that a lot of employees lean on heavily"

What does a typical day look like for you?

Every day is different as an analyst at Hall Capital partners. General day-to-day responsibilities include working on reporting materials (much of which consists of performance, balance sheet, and forward-looking investment pages), managing questions and communicating with external parties such as funds, family offices, tax advisors, and accountants, and attending team check-ins to discuss portfolio decisions and operational action items. Special one-off projects like cash flow projections or investment summaries are in the mix as well. Ensuring good client service always comes first.

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

The ability to have a coffee chat with anyone at the firm has made the greatest impact for me. HCP is filled with brilliant minds from diverse backgrounds. Learning other people's stories, career backgrounds, and journeys to the firm is a privilege and a rarity. Being able to sit down one on one with a senior member really humanizes the type of work we do. Developing relationships here is easier than I would have ever imagined.

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

This role has helped me better understand the ins and outs of the investment space in general and perspectives of all parties involved in an investment decision. The exposure to different investment strategies and the generalist nature of the role allow for more flexibility in future career opportunities. Having developed strong relationships with and been surrounded by intellectual, driven, and passionate individuals has allowed me to form a network that will pay dividends in the future.

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

The most important soft skills I have learned include detail orientation, organization, high quality client service, and the ability to use my best judgement. Some harder skills I have learned include portfolio construction, estate planning, and analyzing large data sets. Additionally, the ability to speak about markets and financial trends with confidence is something I will carry for the rest of my career.

How would you describe the culture at Hall Capital?

The culture at Hall Capital is extremely collaborative and supportive. Some of the greatest bonding moments I have had here include after-hours reporting work with fellow analysts and team happy hours. Hall Capital is a tight-knit community that a lot of employees lean on heavily. Activities such as offsites, team lunches, Giants

games, the holiday party, and others make the Hall Capital experience very enriching. Furthermore, you are always encouraged to voice your opinion.

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

Dynamic.



**Maggy Li, Portfolio Management Group
San Francisco**

What is your alma mater and major?

I graduated from UC Berkeley with a double major in Economics and Business Administration.

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

My coursework in Economics and Business Administration was helpful in building a foundational understanding of finance and the markets to contextualize the work that we do at Hall Capital. However, more importantly, my majors have prepared me with a toolkit of quantitative and qualitative skills necessary to approach new problems from multiple perspectives and to communicate them in a professional manner.

How did you hear about the opportunity here?

I discovered this opportunity through UC Berkeley's careers website.

What was your motivation for accepting the position?

I had a positive interview experience – I thoroughly enjoyed my conversations with the portfolio managers that I met and was excited about the prospect of working with and learning from them. From a professional development perspective, I was excited for the opportunity to gain exposure to different asset classes and to understand how these different types of investments are used to construct portfolios specific to unique client profiles.

What does a typical day look like for you?

While no two days are ever the same, the vast majority of my work falls into two overarching buckets: investment reporting and client service. Investment reporting includes auditing and reconciling data, working on standard reporting materials (including balance sheets and performance schedules), and working on ad-hoc investment analysis projects. Client service work includes communicating and collaborating directly with the client and their external team on miscellaneous requests, such as sourcing documentation and raising cash for upcoming liquidity needs.

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

I have thoroughly enjoyed the opportunity to work on different client relationships with different portfolio managers – it has been an illuminating experience learning not only how different portfolio managers approach investment-related decisions and portfolio construction, but also how those decisions are uniquely shaped by the client profile and short- and long-term goals of the clients. In addition, I have been fortunate to be on a few complex and nuanced client relationships – these have challenged and developed my time-management and multi-tasking skills.

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

I strongly believe that the skills that I have developed at Hall Capital position me to be a more well-rounded and adaptable individual; it will be advantageous regardless of whether I choose to pursue higher education, such as an MBA, or if I decide to transition into another career in finance.

“Everyone is encouraged to reach out to colleagues (including those in other departments) to build new professional relationships and to learn from one another”

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

Having to work on multiple teams and work streams simultaneously, I have developed the critical skills of time management and prioritization.

Furthermore, because there are usually so many moving pieces in the reporting process and any ad-hoc projects that may arise, effective communication, with both internal and external parties, have played an outsized role. I strongly believe that both of these skills will be advantageous in any future roles that I undertake.

How would you describe the culture at Hall Capital?

Hall Capital truly places a heavy emphasis on its collaborative and inclusive culture – everyone is encouraged to reach out to colleagues (including those in other departments) to build new professional relationships and to learn from one another. I also really appreciate how accessible senior management is – all of our managers regularly host “office hour” type forums where all topics (including non-finance ones) are up for discussion.

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

Collaborative.



**Laurence Crandon, Investment Research Group
San Francisco**

What is your alma mater and major?

University of Southern California, Business Administration

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

It gave me a foundation for basic business practice and principles and financial understanding.

How did you hear about the opportunity here?

Through my school job website, Handshake.

What was your motivation for accepting the position?

I believe this was a good opportunity to explore a niche sector of finance, away from investment banking, and with solid compensation.

What does a typical day look like for you?

I will typically have an overarching project like QIR, Pipeline, or PCI that I will find time to try to work on in between request from other departments. I will also have meetings with new or approved managers throughout the day.

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

My first feedback session with the associates on my team. It was great to not only hear the ways they believe I can improve, but also being on the same page as my team.

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

I believe it has been a good introduction to finance, getting to learn what makes a great investor and the jargon of the industry.

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

I have greatly improved my writing skills and ability to digest financial language that is transferrable to future endeavors.

How would you describe the culture at Hall Capital?

I believe the culture is nurturing. From associates to group heads, each member of HCP has helped me learn and grow as a professional. The culture makes it easy to ask questions and learn from your mistakes, which will ultimately lead to more growth.

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

Beneficial.

“I believe the culture is nurturing. From associates to group heads, each member of HCP has helped me learn and grow as a professional. The culture makes it easy to ask questions and learn from your mistakes, which will ultimately lead to more growth.”



**Maya Ghosh, Investment Research Group
San Francisco**

What is your alma mater and major?

Claremont McKenna College; Philosophy, Politics, and Economics

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

Prior to joining Hall Capital, I was skeptical of how my major might contribute to my day-to-day work. However, many aspects of my undergraduate education are applicable to investing. My major helped me develop important skills including critical thinking and data analysis, which I use daily at Hall Capital. My politics and philosophy courses challenged me to synthesize large amounts of information and convey it in a succinct and thoughtful manner, while my economics courses provided me with a quantitative lens to understand consumer behavior and decision-making.

How did you hear about the opportunity here?

I learned about Hall Capital Partners through my college's career services center.

What was your motivation for accepting the position?

My motivation for accepting the position was twofold: the people and the role. After chatting with several Associates and Managing Directors, it was clear that the Hall Capital community was strong, vibrant, and committed to intellectual and professional growth. HCP has a strong mentorship culture, and all members of the community are invested in helping each other succeed. Further, I was excited by the Research role at Hall Capital because it provides a wide and deep view of the financial industry, while also allowing Analysts to specialize in one asset class.

What does a typical day look like for you?

Each day varies greatly, but I typically attend 1-2 meetings with investment managers, help quantitatively and qualitatively examine new investment opportunities, and prepare meeting materials for client and internal purposes. Since the beginning of my tenure, I have been given real tasks and appreciate the amount of responsibility that junior members of our team hold.

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

Since joining Hall Capital, I have greatly enjoyed working on diligences across the private equity ecosystem. Serving as the lead analyst on a recent opportunity (an SF-based venture fund) has been a great learning experience, as I was tasked with completing a quantitative analysis, writing an investment memorandum, and presenting the opportunity to other members of our firm. Taking the lead on this opportunity was impactful because it allowed me to exercise quantitative and qualitative skills that I have developed over the course of my Analyst tenure, while also providing me with an opportunity to strengthen my investment acumen.

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

Regardless of my future endeavors, Hall Capital Partners has helped me develop hard and soft skills applicable to a range of opportunities. In addition to skillset development, I have found the community and mentorship opportunities at HCP to be invaluable. The perspective of senior professionals has helped form some of my career-related decisions and grow my investment judgement.

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

Since I did not pursue investing-related courses during my undergraduate education, I have deeply appreciated the financial knowledge and analytical abilities gained during my time at Hall Capital. Regardless of what my future holds, I hope to continue tapping into my HCP skillset to speak intelligently about investments, markets, and fiscal policy. Further, I have honed many soft skills that are applicable to multiple career paths, including time management, presentation skills, and varying communication styles.

“In addition to skillset development, I have found the community and mentorship opportunities at HCP to be invaluable. The perspective of senior professionals has helped form some of my career-related decisions and grow my investment judgement”

How would you describe the culture at Hall Capital?

The culture at Hall Capital is warm and inclusive. Senior members of the HCP team are invested in the growth and development of junior members, and go out of their way to provide feedback, support, and guidance. Regardless of someone's tenure, all investment perspectives are valued and considered seriously, yielding exciting and engaged conversations. I have deeply enjoyed the HCP culture, and hope to pay it forward over the course of my analyst tenure

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

Engaged.



**Lauryn Whisenant, Investment Research Group
San Francisco**

What is your alma mater and major?

Brigham Young University, Global Supply Chain Management

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

Studying supply chain, especially logistics, helped me develop an approach to problem solving and data-based decision making that has been especially relevant to my role as an analyst at Hall Capital. I also got extremely comfortable with Excel and PowerPoint which I use every day in my role.

How did you hear about the opportunity here?

Personal Network

What was your motivation for accepting the position?

The Hall Capital reputation as well as HCP's track record of mentoring junior team members and preparing analysts and associates for their next opportunity, whether that's another role in investing, business school, or entirely new position and field.

What does a typical day look like for you?

As an analyst on the research team, specifically Private Equity, I spend a lot of time in diligence meetings with fund managers that are both new and existing relationships and creating materials for our clients that consolidate the information we gather from these meetings into a digestible investment recommendation. In addition to these meetings, our team has regular investment discussions and reads materials that keep us up to date on what is happening in the market and private investment space.

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

The comradery of my analyst class and the mentorship of senior professionals at the firm have been two of the greatest resources to my success as an analyst and impactful relationships as I continue to grow as both a working professional and an individual outside of the office.

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

I think this role has given me a platform of knowledge around portfolio management and investing that will be valuable to many future employers. The network that Hall Capital has to offer and role models of senior investment professionals also help to keep me informed on the opportunities that are available after Hall and excited about the future.

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

Collaboration has been a huge part of my role at Hall, especially as an analyst who is constantly trying to learn from my peers and team. I think learning how to collaborate and have constructive and informative conversations will be important in any future role.

How would you describe the culture at Hall Capital?

Collaborative, innovative, intellectual, friendly

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

Rewarding.

“The comradery of my analyst class and the mentorship of senior professionals at the firm have been two of the greatest resources to my success as an analyst”