



## **Welcome to the SEO On-Line Financial Training Overview.**

The first part of your training is an online education program that will help prepare you for the world you are about to enter. Through the generosity of **Zoologic, Inc.** and **Almaris E-Learning Systems**, we are able to provide you with an online curriculum that will help you to be knowledgeable and informed from the day you show up for your summer assignment. This is the same curriculum that many investment banks make available to their first year analysts.

These courses are tailored to your specific division of placement. All interns **MUST** complete the following set of courses on each Learning Path by the date indicated below. There are different levels of exams and you are required to take the one that is in parentheses next to the course name (Int. means intermediate). **You must take an exam after every course and score 90% or better on the ZooLogic Courses and 80% or better on the Almaris E-Learning Courses. Do not wait till the last minute to complete these courses, as the training courses can take up to a total of 50 hours to complete.**

**\*\*\*PLEASE REVIEW THE COURSES YOU ARE REQUIRED TO COMPLETE. EACH PROGRAM WILL HAVE TO COMPLETE DIFFERENT COURSES. THE COURSES CAN BE FOUND BELOW\*\*\***

**\*\*\*INVESTMENT BANKING INTERNS: YOUR PLACEMENT REFERS TO THE DIVISION WITHIN OUR CORPORATE PARTNER THAT YOU WILL BE WORKING IN OVER THE SUMMER\*\*\***

**Click on the link below to access Zoologic, Inc.**

<http://services.zoologic.com/hpss/launch.html>

**Click on the link below to access Almaris E-Learning Systems**

(Note: In order to begin the Almaris E-Learning Systems Training, you will need a CD. The CD will be mailed to you by SEO. Only those interns who are required to take the Almaris E-Learning Systems Training will receive the CD)

<http://www.almaris.com/assess/help/seo.htm>

# Asset Management

## ZooLogic Courses (To Be Completed by FRIDAY, APRIL 30<sup>TH</sup>)

- Introduction to Securities Markets (Basic Exam)
- Introduction to Equity Valuation (Intermediate Exam)
- Introduction to Corporate Finance (Intermediate Exam)
- Introduction to Analyzing Financial Statements (Basic Exam)
- Fundamentals of Economic Indicators (Intermediate Exam)
- Ratio Analysis - v2 (Basic Exam)
- Introduction to Credit Risk (Intermediate Exam)
- Investment Principles (Basic Exam)
- Asset Allocation (Basic Exam)
- Long-Term Debt Securities (Basic Exam)
- Portfolio Diversification (Intermediate Exam)
- Portfolio Returns (Intermediate Exam)
- Portfolio Risk (Intermediate Exam)
- The Human Side of Investing (Basic Exam)
- Managing Client Expectations (Intermediate Exam)
- Investing in Equity (Basic Exam)
- Investing in Bonds (Basic Exam)
- Introduction to Portfolio Management (Intermediate Exam)
- Portfolio Duration (Intermediate Exam)
- Introduction to Bonds (Intermediate Exam)
- Yield (Intermediate Exam)
- Short-Term Debt Securities (Basic Exam)
- Dividend Policy (Basic Exam)

## Additional ZooLogic Courses (Recommended):

- The Balance Sheet
- The Income Statement
- Cash Flow Statement
- Time Value of Money
- Introduction to Foreign Exchange
- Hedging Equity with Futures and Options
- Alternative Investments
- Investing in Money Market Instruments

# Corporate Law

## ZooLogic Courses (To Be Completed by FRIDAY, MAY 14<sup>TH</sup>)

- Cash Flow Statement - v2 (Intermediate Exam)
- The Balance Sheet - v2 (Intermediate Exam)
- The Income Statement - v2 (Intermediate Exam)
- Ratio Analysis - v2 (Basic Exam)
- Introduction to Securities Markets (Basic Exam)
- Introduction to Investment Banking (Intermediate Exam)
- Introduction to Corporate Finance (Intermediate Exam)

## Additional ZooLogic Courses (Recommended):

- Initial Public Offerings
- Mergers and Acquisitions

# Global Corporate Leadership

## ZooLogic Courses (To Be Completed by FRIDAY, APRIL 30<sup>TH</sup>)

- Time Value of Money (Intermediate Exam)
- Introduction to Analyzing Financial Statements (Basic Exam)
- Fundamentals of Economic Indicators (Intermediate Exam)
- Introduction to Capital Budgeting (Intermediate Exam)
- Capital Budgeting - Deriving the Cash Flows (Basic Exam)
- Cash Flow Analysis (Basic Exam)
- Operational Risk Fundamentals (Basic Exam)

## ZooLogic Courses (Required for Mercer, Marsh and AXA Equitable):

- Insurance Overview US (Basic Exam)

## Additional ZooLogic Courses (Recommended):

- Understanding a CFO's Challenges
- Introduction to Foreign Exchange

## Almaris E-Learning Systems Courses (To Be Completed by FRIDAY, APRIL 30<sup>TH</sup>)

- Understanding Financial Statements: "1. Progress1"
- Costs and Expenses: "2. Progress2"
- Time Value, Bonds, and Liabilities: "3. Progress3"
- Leases, Taxes, Investments, and Cash Flows: "4. Progress4"
- Receivables: "5. 01Recv"
- Deferred Revenues: "6. 01DefRev"
- Deferred Expenses or Prepayments: "7. 01DefExp"
- Accrued Expenses or Payables: "8. 01AccExp"
- Inventories: "9. 01Invntry"
- Inventories and Payables: "10. 01InvPybl"
- Property, Plant, and Equipment: "11. 01PPE"
- Financing Activities: "12. 01Financing"
- Derive Balance Sheet: "13. 02BalSheet"
- Linking Financial Statements: "14. 02Link"
- Derive Income Statement: "15. 02Income"
- Derive Direct Operating Cash Flow Statement: "16. 02DirectOCF"

# Philanthropy

## ZooLogic Courses (To Be Completed by FRIDAY, APRIL 30<sup>TH</sup>)

- Cash Flow Statement - v2 (Basic Exam)
- The Balance Sheet - v2 (Basic Exam)
- The Income Statement - v2 (Basic Exam)
- Asset Allocation (Basic Exam)
- Investment Principles (Basic Exam)

# Investment Banking

## Corporate Finance interns only

### ZooLogic Courses (To Be Completed by FRIDAY, APRIL 30<sup>TH</sup>)

- Time Value of Money (Intermediate Exam)
- Introduction to Securities Markets (Basic Exam)
- Introduction to Equity Valuation (Intermediate Exam)
- Introduction to Corporate Finance (Intermediate Exam)
- Introduction to Analyzing Financial Statements (Basic Exam)
- Fundamentals of Economic Indicators (Intermediate Exam)
- Introduction to Capital Budgeting (Intermediate Exam)
- Capital Budgeting - Deriving the Cash Flows (Basic Exam)
- Working Capital - v2 (Intermediate Exam)
- Ratio Analysis - v2 (Basic Exam)

### Almaris E-Learning Systems Courses (To Be Completed by FRIDAY, APRIL 30<sup>TH</sup>)

- Understanding Financial Statements: "1. Progress1"
- Costs and Expenses: "2. Progress2"
- Time Value, Bonds, and Liabilities: "3. Progress3"
- Leases, Taxes, Investments, and Cash Flows: "4. Progress4"
- Receivables: "5. 01Recv"
- Deferred Revenues: "6. 01DefRev"
- Deferred Expenses or Prepayments: "7. 01DefExp"
- Accrued Expenses or Payables: "8. 01AccExp"
- Inventories: "9. 01Invntry"
- Inventories and Payables: "10. 01InvPybl"
- Property, Plant, and Equipment: "11. 01PPE"
- Financing Activities: "12. 01Financing"
- Derive Balance Sheet: "13. 02BalSheet"
- Linking Financial Statements: "14. 02Link"
- Derive Income Statement: "15. 02Income"
- Derive Direct Operating Cash Flow Statement: "16. 02DirectOCF"

### Additional ZooLogic Courses (Recommended):

- Capital Asset Pricing Model
- Capital Structure
- Initial Public Offerings
- Mergers and Acquisitions

## Sales & Trading, UBS President's Summer Internship Program, and Credit Suisse Douglas L. Paul Scholarship for Achievement interns only

### ZooLogic Courses (To Be Completed by FRIDAY, APRIL 30<sup>TH</sup>)

- Time Value of Money (Intermediate Exam)
- Introduction to Securities Markets (Basic Exam)
- Introduction to Equity Valuation (Intermediate Exam)
- Introduction to Corporate Finance (Intermediate Exam)
- Introduction to Analyzing Financial Statements (Basic Exam)
- Fundamentals of Economic Indicators (Intermediate Exam)
- Introduction to Capital Budgeting (Intermediate Exam)

- Capital Budgeting - Deriving the Cash Flows (Basic Exam)
- Working Capital - v2 (Intermediate Exam)
- Ratio Analysis - v2 (Basic Exam)
- Introduction to Credit Risk (Intermediate Exam)
- Introduction to Options (Intermediate Exam)
- Introduction to Swaps (Intermediate Exam)
- Introduction to Energy Derivatives (Intermediate Exam)
- Yield (Intermediate Exam)
- Yield Analytics (Intermediate Exam)
- Bond Duration (Basic Exam)
- Bond Price Sensitivity (Intermediate Exam)
- Long-term Debt Securities (Basic Exam)
- Introduction to Foreign Exchange (Intermediate Exam)
- Life of a Trade: U.S. Domestic (Intermediate Exam)
- Interest Rate Swaps (Intermediate Exam)
- Introduction to Credit Derivatives: Part One (Intermediate Exam)
- Introduction to Credit Derivatives: Part Two (Intermediate Exam)
- Introduction to Option Pricing Theory (Intermediate Exam)
- Tools for Evaluating Options (Intermediate Exam)

**Additional ZooLogic Courses (Recommended):**

- Managing Time at Work
- Business Math Boot Camp
- Life of a Trade: U.S. Domestic
- Life of a Trade: Global
- Introduction to Equity Derivatives Strategies
- Equity Derivative Strategies: Profit/Loss Analysis
- Caps, Floors, and Swaptions
- Hedging Currency Risk with Derivatives
- Introduction to Prime Brokerage

## Research interns only

**ZooLogic Courses (To Be Completed by FRIDAY, APRIL 30<sup>TH</sup>)**

- Time Value of Money (Intermediate Exam)
- Introduction to Securities Markets (Basic Exam)
- Introduction to Equity Valuation (Intermediate Exam)
- Introduction to Corporate Finance (Intermediate Exam)
- Introduction to Analyzing Financial Statements (Basic Exam)
- Fundamentals of Economic Indicators (Intermediate Exam)
- Working Capital - v2 (Intermediate Exam)
- Ratio Analysis - v2 (Basic Exam)
- Introduction to Bonds (Intermediate Exam)
- Introduction to Investment Banking (Intermediate Exam)
- Cash Flow Analysis (Basic Exam)

**Almaris E-Learning Systems Courses (To Be Completed by FRIDAY, APRIL 30<sup>TH</sup>)**

- Understanding Financial Statements: "1. Progress1"
- Costs and Expenses: "2. Progress2"
- Time Value, Bonds, and Liabilities: "3. Progress3"
- Leases, Taxes, Investments, and Cash Flows: "4. Progress4"
- Receivables: "5. 01Recv"
- Deferred Revenues: "6. 01DefRev"
- Deferred Expenses or Prepayments: "7. 01DefExp"
- Accrued Expenses or Payables: "8. 01AccExp"

- Inventories: “9. 01Invntry”
- Inventories and Payables: “10. 01InvPybl”
- Property, Plant, and Equipment: “11. 01PPE”
- Financing Activities: “12. 01Financing”
- Derive Balance Sheet: “13. 02BalSheet”
- Linking Financial Statements: “14. 02Link”
- Derive Income Statement: “15. 02Income”
- Derive Direct Operating Cash Flow Statement: “16. 02DirectOCF”

**Additional ZooLogic Courses (Recommended):**

- Capital Asset Pricing Model
- Capital Structure
- Introduction to Energy Derivatives
- Introduction to Capital Budgeting
- Capital Budgeting-Deriving the Cash Flows
- Investing in Equity
- Investing in Bonds
- Yield
- Dividend Policy
- Introduction to Foreign Exchange

## Accounting/Finance interns only

**ZooLogic Courses (To Be Completed by FRIDAY, APRIL 30<sup>TH</sup>)**

- Time Value of Money (Intermediate Exam)
- Introduction to Securities Markets (Basic Exam)
- Introduction to Equity Valuation (Intermediate Exam)
- Introduction to Corporate Finance (Intermediate Exam)
- Introduction to Analyzing Financial Statements (Basic Exam)
- Fundamentals of Economic Indicators (Intermediate Exam)
- Introduction to Capital Budgeting (Intermediate Exam)
- Capital Budgeting - Deriving the Cash Flows (Basic Exam)
- Working Capital - v2 (Intermediate Exam)
- Ratio Analysis - v2 (Basic Exam)

**Additional ZooLogic Courses (Recommended):**

- IAS vs. GAAP
- IAS vs. GAAP: Derivatives and Hedging

**Almaris E-Learning Systems Courses (To Be Completed by FRIDAY, APRIL 30<sup>TH</sup>)**

- Understanding Financial Statements: “1. Progress1”
- Costs and Expenses: “2. Progress2”
- Time Value, Bonds, and Liabilities: “3. Progress3”
- Leases, Taxes, Investments, and Cash Flows: “4. Progress4”
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- Derive Direct Operating Cash Flow Statement: “16. 02DirectOCF”

## Information Technology interns only

### ZooLogic Courses (To Be Completed by FRIDAY, APRIL 30<sup>TH</sup>)

- Time Value of Money (Intermediate Exam)
- Introduction to Securities Markets (Basic Exam)
- Introduction to Equity Valuation (Intermediate Exam)
- Introduction to Corporate Finance (Intermediate Exam)
- Introduction to Analyzing Financial Statements (Basic Exam)
- Fundamentals of Economic Indicators (Intermediate Exam)
- Introduction to Capital Budgeting (Intermediate Exam)
- Capital Budgeting - Deriving the Cash Flows (Basic Exam)
- Life of a Trade: U.S. Domestic (Intermediate Exam)

### SkillSoft Courses (To Be Completed by FRIDAY, APRIL 30<sup>TH</sup>)

- ANSI C Programming: Introducing C
- C++ Programming: Structured Programming
- C++ Programming: Manipulating Objects
- ANSI C Programming: Pointers
- ANSI C Programming: The Standard Library and Preprocessor
- Operators and Flow Control in Java
- Working with Classes in Java
- Exception Handling and Assertions
- Basic GUI Development in Java
- Reference Types and Threading
- Programming Techniques and Strategies
- General Coding Best Practices
- Object-oriented Coding Best Practices
- Maintaining Quality Code
- Core Concepts in Business Analysis

## TSS interns only

### ZooLogic Courses (To Be Completed by FRIDAY, APRIL 30<sup>TH</sup>)

- Time Value of Money (Intermediate Exam)
- Introduction to Securities Markets (Basic Exam)
- Cash Flow Analysis (Basic Exam)
- Introduction to Corporate Finance (Intermediate Exam)
- Introduction to Analyzing Financial Statements (Basic Exam)
- Fundamentals of Economic Indicators (Intermediate Exam)
- Introduction to Capital Budgeting (Intermediate Exam)
- Capital Budgeting - Deriving the Cash Flows (Basic Exam)
- Operational Risk Fundamentals (Basic Exam)
- Introduction to Credit Risk (Intermediate Exam)

### Additional ZooLogic Courses (Recommended):

- Understanding a CFO's Challenges

### Almaris E-Learning Systems Courses (To Be Completed by FRIDAY, APRIL 30<sup>TH</sup>)

- Understanding Financial Statements: "1. Progress1"
- Costs and Expenses: "2. Progress2"
- Time Value, Bonds, and Liabilities: "3. Progress3"
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