

PRIME NEWSLETTER



The Philadelphia Regional Investing Mentorship Experience
A Partnership of Penn Capital

PRIME is Expanding

The PRIME Program is pleased to announce the PRIME Internship. Penn Capital is expanding its commitment to community outreach and promoting gender and racial diversity, by offering a PRIME summer Internship to a collegiate female majoring in business or finance. The PRIME Intern will have the opportunity to work closely with Penn Capital's portfolio managers, investment analysts, and traders to gain valuable in-depth and practical work experience in the asset management industry.

In addition, the PRIME Program will host its first fundraising event, the Penn Capital Golf Outing, which supports a scholarship to Valley Forge Military Academy and College. PRIME will work closely with the college to select a female student majoring in business or finance as the scholarship recipient. All proceeds from this event will benefit the scholarship.

PRIME Year in Review

Our first year is coming to an end and we are encouraged by the success of the PRIME program and inspired by the dedicated and enthusiastic group of young women at the Academy @ Palumbo. We were fortunate to have some wonderful facilitators who are eager to teach workshops again next year as we continue to develop and expand the PRIME Program.

This year, we held eight successful workshops focused on important topics which related to personal finance and literacy. They sparked engaging and lively discussions among the PRIME participants.

PRIME Workshop Facilitators

The following individuals were some of the PRIME workshop facilitators from this past year.

Vedra Chandler

Ms. Chandler is a singer/performer who manages a community-driven initiative, Coopers Ferry Partnership, that seeks to activate underutilized spaces through the identification and implementation of artistic, cultural, and recreational projects and activities in order to create safe and vibrant gathering places for the City of Camden's residents.

Ms. Chandler's workshop focused on basic money management and creating a proper spending plan. The activities focused on issues of responsibility versus impulse and the importance of delayed gratification in seeking financial goals.

Dr. Nelly Silva, DMD

Dr. Silva owns her own dental practice and office building, and is a strong presence in community outreach. Dr. Silva focused on how to create a spending plan. She shared her experiences creating a spending plan for her business and provided an overview of income and savings.

Charlotte Laurent-Ottomane

Ms. Laurent-Ottomane co-founded and serves as the Executive Director of the Thirty Percent Coalition. Previously, her international career included a senior leadership role with a Global 200 company and launching Nvestcom, a strategic advisory firm.

Ms. Laurent-Ottomane traveled from Florida to facilitate a workshop covering the importance of saving and the different types of savings vehicles. She also explained many of the most common financial terms.

Anne McGoldrick

Ms. McGoldrick is a seasoned operational and financial executive. Ms. McGoldrick's workshop provided an introduction to credit cards and examined the concepts of good versus bad debt and credit.

Christopher DiFusco, Dominique Cherry, & Eryn-Ashlei Bailey

One workshop was a team effort by three individuals working for the City of Philadelphia. Christopher DiFusco is the Chief Investment Officer, Dominique Cherry is a Senior Investment Officer, and Eryn-Ashlei Bailey is an Investment Officer for the city.

All three facilitators from the city Investment Unit provided an in-depth review of financial goals and real world scenarios relating to making good financial decisions.

If interested in learning more about the PRIME program please contact Lindsay Heckman, PRIME Program Director at Lheckman@penncapital.com.

PRIME Travels to Penn Capital

This spring, Penn Capital is hosting the final workshop of the sophomore year curriculum for the PRIME Program participants. This year's facilitators, together with the women of Penn Capital will join the girls for a meeting that will showcase paths to success in business. The PRIME Program is excited for this year's class to get a glimpse at the financial industry through the final workshop at the firm and its female employees.

About Us

Penn Capital is an independent, employee-owned boutique investment management firm based in Philadelphia. We forge our own ideas, we respect hard work, and we are committed to our clients, our staff and our community.

We are dedicated to being a partner in our community by combining our corporate resources with community needs through charitable contributions and employee involvement. The Penn Capital Philanthropic Committee is comprised of employees across the firm who volunteer their time and talents and are responsible for creating and implementing the firm's philanthropic initiatives and volunteer opportunities.

Visit www.penncapital.com for more information on our firm.

