

LeBow Summer Investment Certificate



Learn manager research, due diligence, and asset allocation alongside practitioners who live it every day. Build real skills and a real network at the same time.

More Than a Course

Practitioners are evaluating talent in real time. Performance here creates relationships, references, and recruiting conversations that never happen through a resume screen.

10

Weeks

10

Seats

1

Weekly Session

June 1

Start Date

\$0

Drexel Students

What This Program Is

The LeBow Summer Investment Certificate is a 10-week, practitioner-led intensive that puts students inside the actual workflows of professional asset management. You will engage in it directly — working alongside allocators and managers who are active in the field and present throughout every stage.

No prior coursework required. The first two weeks establish a shared foundation — whether you are a first-year exploring finance or an upperclassman deepening expertise, you belong here.

Enrollment

Drexel Students

FREE

Seats Available

10

First-come, first-served. Light application process may apply if demand exceeds capacity.

Three Core Disciplines

MANAGER RESEARCH

Identify, evaluate, and compare investment managers using institutional due diligence frameworks

DUE DILIGENCE

Assess investment processes, risk controls, team quality, and performance attribution

ASSET ALLOCATION

Understand how institutional portfolios are built across asset classes and risk objectives

Practitioners are not guest speakers — they are partners. Industry professionals are embedded throughout: co-facilitating sessions, reviewing deliverables, offering real-time feedback, and building relationships with students they identify as top talent. The network you build here is part of the curriculum.

Program Details

DATES

June 1 - Aug 8, 2026

SCHEDULE

Wednesday's 6:30-8:30 pm

FORMAT

In-person

PREREQUISITES

None - all backgrounds welcome

COMPLETION

Certificate on all deliverables

Ready to work alongside the professionals who shape institutional investing?

Contact Rob Morier to express interest or request a full syllabus • rlm343@drexel.edu

EXPRESS INTEREST

About the Instructor

INSTRUCTOR

Robert Morier

Finance Practitioner & Lecturer LeBow
College of Business, Drexel University
25+ years of industry experience

PROGRAM ADVISOR

Catherine Ulozas

Chief Investment Officer Drexel University
Office of Investments

Who Should Apply

- **Finance students (all years)**
From first-year to graduate—no investment coursework required.
- **Motivated self-starters**
Intrinsic drive matters more than GPA or prior experience.
- **Career changers & co-op students**
Evening format accommodates work and academic schedules.
- **External participants**
Open to motivated students from any university at \$4,000.

Built on a Proven Model

This program extends the model proven in Drexel's acclaimed Callan partnership course — where firms engaged deeply because the structure gave them real signal on talent. The evaluation shifts from resumes to observed performance in a live investment environment. Students are not graded on what they know coming in — they are evaluated on how they think, engage, and grow throughout the program.

Frequently Asked Questions

Do I need prior finance coursework?

No. The first two weeks level-set all participants regardless of background.

Is this for credit?

No — non-credit. No financial aid implications, no prerequisites.

Can I participate if I am on co-op?

Yes. Evening sessions and async labs are designed around busy schedules.

How are students selected?

First-come, first-served. A light application may apply if oversubscribed.

Week-by-Week Overview

WEEKS 1-2 Foundation & Leveling

- Asynchronous market and portfolio theory modules
- Investment vocabulary and frameworks
- All participants brought to common baseline

WEEKS 3-5 Manager Research & Due Diligence

- Practitioner-led research methodology sessions
- Live manager Q&A with active asset managers
- First written deliverable: manager evaluation memo

WEEKS 6-8 Asset Allocation & Portfolio Construction

- Institutional portfolio construction frameworks
- Hands-on casework with partner firms
- Team presentations reviewed by practitioners

WEEKS 9-10 Final Presentations

- Investment committee-style final presentations
- Panel of industry professionals as evaluators
- Certificate of completion awarded

Scan here to apply!



Interested? Contact Rob Morier for the full syllabus and enrollment details.

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