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	20	1	June 1	$4,000
Weeks	Seats	Weekly Session	Start Date	Cost

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

External Participants	$4,000
Seats Available	20

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.

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

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.

Scan here to apply!

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

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