

RMA (Risk Management Association) Orange County Commercial Lending Challenge Case Competition Spring 2023

RMA Orange County is hosting a Spring Business Case competition for university students considering a career in banking / finance. The competition provides students a chance to experience the world of commercial banking. Student teams will represent a bank loan team tasked with arranging a multi-million-dollar commercial loan package to a mid-sized business. Teams will receive information on a business, perform research on the assignment and meet with banking experts for advice on the case. Teams will then prepare an underwriting of the loans to present to judges representing the “bank loan committee”, plus a customer proposal to present to judges representing management of the “mid-sized business”. The winning team will split prize money of \$2,000 with second place team receiving \$1,000; all participants will receive a gift from RMA.

Challenge Overview

The competition is open to business schools of local universities and primarily intended for upper class (junior and senior) students and graduate students. Students should sign up in teams of 3-4 using the Registration Form attached. The competition will kick off by providing all relevant information on the mid-sized business that is seeking commercial loans from the student teams, plus detailed instructions for the competition. Each team will also receive a mentor from the Orange County banking industry to help answer questions, provide guidance and assist with presentation requirements. Students receive a free 1-year membership to RMA to access educational resources on commercial lending and other related topics that will be helpful in preparing the case. The case will encompass topics such as loan structuring, pricing, collateral, loan covenants, industry considerations and many other aspects. Student teams will have approximately 6 weeks to prepare written and oral presentations required. Judging criteria will be provided to help guide the teams in their preparation of the case. Faculty members and student families are encouraged to attend the final presentations.

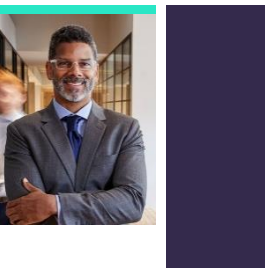
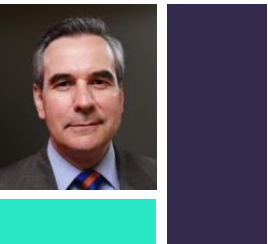
Timeline

- FEBRUARY 6, 2023** – Registration opens
- FEBRUARY 28, 2023** – Last day to register
- WEEK OF FEBRUARY 28, 2023** – Case released and mentor introduction
- APRIL 7, 2023** – Last day to talk with mentors
- APRIL 14, 2023** – Commercial lending challenge presentations 11:30 at

Comerica Bank
611 Anton Blvd., 1st Floor
Costa Mesa, CA 92626

Competition Sponsors





Registration Details

Thank you for your interest in joining the RMA OC inaugural Spring Business Case Competition! The skills developed through this program will equip you for a variety of opportunities in the banking and finance industries. We wish you the best of luck and look forward to fostering your success in education!

Due date: February 28, 2023

Team Name: _____

Team Leader: _____

Phone Number: _____

Email: _____

Team Member: _____

Phone Number: _____

Email: _____

Team Member: _____

Phone Number: _____

Email: _____

Team Member: _____

Phone Number: _____

Email: _____

Submit entries to:

John Marder

johnmarder@outlook.com | 714-454-1737

Orange County Chapter of Risk Management Association | rmaoc.org

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