Interview Assessment #14

Name of Professional : Joseph Carter

Profession : Financial Supervisor

Company Name : Petoskey Plastics

Date of Interview : 11/12/24

Assessment :

During this interview I had figured out what I was going to do for my original work and had decided what kind of company I was going to use, but I still haven't figured out many of the specifics. During this interview my aim was to finalize the answers to these questions. This includes figuring out how I would present my final valuation, I know somehow an excel but had not figured out the specifics. Also narrowing down my company.

Before this interview I knew I wanted to do a major corporation with information accessible by the public, but during the interview Mr. Carter showed me that I should look at a company I am relatively familiar with that is not very relative with other businesses, which led to me to choose the major corporation of Starbucks. Furthermore, he shared with me information of his first valuation he conducted and what sort of data he collected and how he organized when he did it, which gave me a very good idea of what mine should look like and how I should organize it on excel.

Some highlights of the interview include getting access to this new information, which significantly helped me create my valuation which will be used in the future. Something unexpected I did learn though was how important looking at stock prices and their shares were. I had no idea how big of a role stocks would play. Rather than just looking at the physical money, this significantly changed what I thought my original work would originally look like.

This new knowledge also significantly affected my understanding of conducting a valuation and helped me learn how professionals in the real-world do it. Before this interview I had only gathered data to conduct a valuation using revenue and depreciation, but had never looked at the overall stock prices. Furthermore, I care about this because this will make my original work more reliable and add another aspect to my whole valuation.

In addition, everything this interview shared with me about what company to use I completely agreed with, as it allowed me to look at a company that wouldn't be related to other companies. Choosing Starbucks further reinforced the idea of an Intrinsic valuation rather than a Relative valuation, which again is like what other professionals had been telling me as Relative valuations are very biased and hard to accomplish when looking at a singular company. Also, making the research process a lot longer which I knew I could not fit in the strict deadlines of when the Original Work was due.

Overall some things I am still interested in include taking what I have learned from this interview and looking deeper into more research that I have not conducted yet to fill all the gaps of my Original Work. In addition I will continue to keep on the same path when creating my Original Work, but this time looking more at stock research rather than all the inventories and debt research I had already conducted.