

Investment Management Certificate Program (IMCP)

University of Wisconsin-Milwaukee

Lubar School of Business

www.lubar.uwm.edu/IMCP

Class of 2025 Resume Packet:

Tawfeeg Arabiyat

Julian Balboa

Alex Byrne

Joseph Clavette

Madeline Falkenberg

Edward Foote

Felix Gerlach

Sebastian Gregor

Jacob Johnson

Maxwell Lavin

Kevin Marchewka

Alexander Mason

Danny Muellner

Zahra Nemati Najafabadi

Joseph Reitmeyer

Jacob Sprister

Jonathan Strange

Olivia Webers

Shane Wiegert

Contact Information:

Director: G. Kevin Spellman, CFA, PhD

608-334-2110; spellman@uwm.edu

Tawfeeg Arabiyat

Oconomowoc, WI | taffyar@gmail.com | (262) 720-4984

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance

Cumulative GPA: 3.84 | Dean's List: 2/4 semesters

Investment Management Certificate Program

- 21-month CFA University Affiliated Program for a select group of students
- Work on portfolios with over \$10 million, present performance, attribution, and strategies to investment boards
- Analyze securities over multiple asset classes

Adventis Financial Modeling Level 1 Certificate Training

Bloomberg Market Concepts Certification

Milwaukee, WI

Graduation: May 2025

Fall 2023

Fall 2023

PROFESSIONAL EXPERIENCE

Rockwell Automation

Finance Intern

- Conduct thorough analysis of financial data to identify and address discrepancies and resolve issues efficiently
- Collaborate with leadership team to review cash positions and establish effective communication channels, ensuring transparency and facilitating informed decision-making
- Utilize Oracle for financial planning and analysis, proactively identifying areas for improvement and providing recommendations to enhance the accuracy and timeliness of financial reports

Dana Investment Advisors

Fixed Income Intern

- Acquired comprehensive knowledge of corporate bond analysis in the investment-grade sector, enabling a deep understanding of market dynamics and momentum
- Performed thorough cash position reviews and maintained open communication with the portfolio manager
- Used CreditSights and Bloomberg to actively monitor credit ratings, identifying potential upgrades and downgrades and provided valuable insights to support portfolio management

Landmark Credit Union

Consumer Loan Auditor

- Reviewed documents to ensure accuracy and compliance with established underwriting guidelines, meticulously verified loan data and inputted it into the Fiserv computer system
- Facilitated seamless document flow by submitting required paperwork to relevant entities, provided valuation reports to members, and efficiently processed early disclosures for home equity loans, expediting the review process for underwriters

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet, CreditSights, and ISS-EVA Investor Express**
- **Microsoft Excel, Word, and PowerPoint**
- **R-Studio (basic)**

EXTRACURRICULAR

Basketball Club at UWM-Waukesha

President/ Founder

- Developed schedules with club officers for open gyms, basketball tournaments, and non-basketball activities
- Communicated with faculty and students to create a healthy court environment
- Founded the club with five members and increased club membership by 200% in one year

Hobbies

- Engaging in a variety of sports activities, including intermural basketball for UW-Milwaukee
- Actively engaged in stock and options trading through Charles Schwab since 2020, demonstrating a keen interest in financial markets and a proactive approach to managing personal investments

September 2021 – September 2022

Julian Balboa

Milwaukee, WI | julianbalboa1222@gmail.com | (847) 644-0132

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Cumulative GPA: 3.543 | Business Scholars Program

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes
- Finance 25% of tuition/living expenses through employment while a full-time student

Milwaukee, WI

Graduation: May 2025

Adventis Financial Modeling Level I Certification

Fall 2023

PROFESSIONAL EXPERIENCE

Robert W. Baird

Advisory Operations & Trading Department intern

- Ensure operations of opening, change, and closing accounts run smoothly
- Work alongside a team of associates to work efficiently on automating and streamlining processes
- Communicate with associates in all departments via email and phone

Milwaukee, WI

Jan. 2023 – Present

UWM Lubar School of Business Advising Office

Communication Skills, Organizing, and Customer Service

- Worked with students to solve scheduling issues
- Communicate with faculty and complete projects
- Formulated professional and coherent emails to faculty and students daily

Milwaukee, WI

Feb. 2022 – Jan. 2023

Jewel Osco Service Clerk

Leading, Customer Service

- Lead a small team of front-end service clerks
- Helped customers find exactly what they needed and provided great customer service
- Organized roles and responsibilities between members for a new drive up and go process

Franklin Park, IL

June 2020 – July 2021

SKILLS

- **Bloomberg (basic), FactSet, and ISS-EVA Investor Express**
- **Microsoft Excel, Word, and PowerPoint**
- **VBA, Python (basic), web scraping, and website development**
- **Leadership and effect public speaking**

EXTRACURRICULAR

Delta Sigma Pi

Nov. 2021 – Present

- **Vice President of Fundraising**

Spring 2022

Weekly presentation to a group of 65, planned and organized events related to funding, wrote memos and emails

- **Vice President of Professional Activities**

Presented to a group of 57 individuals, actively engaged with 15 executives in a professional context, organized meetings to foster meaningful connections with various professionals, effectively handled a speaker cancellation at an event I coordinated, and ultimately delivered a compelling presentation by swiftly adapting to the circumstances

Leadership and Excellence Academies for Deltasigs (LEAD) Conference

Spring 2022

Student Investment Club

May 2023 – Present

- Member

Hobbies

- Football, art (murals), playing saxophone, and weight lifting
- Edit and film short videos and movies

Alexander Byrne

Milwaukee, WI | alexlb0422@gmail.com | (920) 988-5200

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Cumulative GPA: 3.2 | Major GPA: 4.0

Milwaukee, WI

Graduation: May 2025

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes

PROFESSIONAL EXPERIENCE

Province Firm

Analyst Intern

Las Vegas, NV

June 2023 – August 2023

- Evaluated first-day motions, 13-week cash flow analysis, liquidity forecasting, constructing recovery waterfalls, lender update presentations, vendor analysis, SOALs / SOFA/s / MORs, KEIP & KERP analysis, liquidation, wind-down and claims analysis, and three-statement models
- Created detailed three-statement financial models, ad hoc analytics, and company valuations
- Assisted with the preparation of presentation materials and provided thoughtful research and analysis for clients
- Worked with senior personnel to develop comprehensive solutions to complex financial challenges across industries

Brew City Capital

Acquisitions Consultant

Milwaukee, WI

October 2022 – Present

- Evaluate regional and local market fundamentals to identify target submarkets
- Work with management to develop strategies to maximize returns throughout all investments
- Support the executive teams in all elements of the development/acquisition identification, due diligence, entitlement, permitting and construction
- Develop and maintain relationships with capital groups such as private equity firms, family offices, etc.
- Create and understand every aspect of a proforma including total project costs, revenue projections, cash flows and how each variable effects estimated returns

Sotol Capital.

Acquisitions Associate/Intern

Milwaukee, WI

April 2022 – August 2022

- Performed overall analytical reviews for various public and privately held firms throughout Midwest
- Completed 20+ non-mandatory hours of private equity, banking, and wealth management learning modules
- Assisted in auditing functions as part of the Financial Services Office, a team dedicated to banking and insurance

Selected Project Experience

- **Initiating coverage report** for Exact Sciences (Ticker: EXAS) **Fall 2023**
 - Analyze business and industry drivers and quantify in financial forecasts and value using multiple methods

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet, and ISS-EVA Investor Express**
- **Microsoft Excel, Word, and PowerPoint**
- **Intermediate Financial Modeling (Real Estate) and Financial Modeling (DCF, etc.)**

EXTRACURRICULAR

Student Investment Club, *Vice President*

Sept. 2021 – Present

- Assist in management of a \$100,000 portfolio
- Lectured our 30+ members about the public markets, stock analysis, and the economy

Plymouth UCC, *Board Member*

- Assist in the management of a \$400,000 budget and a \$1.8 million endowment

Books Read

- Irrational Exuberance, The Intelligent Investor, Berkshire Hathaway's Letters to Shareholders

Joseph Nicholas Clavette

Brookfield, WI | jnclavette@gmail.com | (262) 957-4800

EDUCATION

University of Wisconsin-Milwaukee

Management Masters, Concentration in Finance Analysis

Cumulative GPA: 4.00

Investment Management Certificate Program (lubar.uwm.edu/IMCP)

- 21-month CFA University Affiliated Program for a select group of students
- Work on portfolios with over \$10 mil and present to investment boards
- Analyze securities over multiple asset classes

Milwaukee, WI

Graduation: May 2025

University of Wisconsin-Madison

Bachelor of Science, Atmospheric Oceanic Sciences

Certificate in Environment Sciences

Madison, WI

Graduation: Dec. 2017

WORK EXPERIENCE

Elmbrook Humane Society

Class Project Work

Brookfield, WI

Spring 2024

- Analyze performance and positioning and present to a board for approximately \$5 mil in AUM

Clavette Homes

President

Greater Milwaukee, WI

Oct. 2020-Present

- *Financing:* Perform detailed forecasts of expenses to determine the pricing and profits of projects; perform site research, including location identification, detailed home comparisons, and oversee the entire process from bidding to closing, ensuring code compliance
- *Legal:* Develop contractual overviews for trades and dwelling licenses in compliance with industry regulations and standards
- *Operations:* Schedule all home builds, manage contractors, and maintain a clean job site while conforming to the building standards set by the NAHB
- *Marketing:* Compile and create sales materials, including home brochures, renders, home listings, and closing documentation

Trustway Homes

Vice President

Greater Milwaukee, WI

Jan. 2019-Dec. 2021

- *Finance & Operations:* Responsible for all survey layouts, utility placements, site cost analysis, and purchase orders; effectively managed pricing, payments, and schedules
- *Operations:* Oversaw all aspects of home builds, including leading project managers, to ensure smooth operations and successful completion
- *Management:* Led all team meetings, encompassing customer relations, selections gathering, company overview, and closings, fostering effective communication and collaboration

Project Manager

Mar. 2018-Dec. 2018

- Effectively managed a team of contractors, including coordinating their schedules, distributed purchase orders and payments for 14 homes across Southeast Wisconsin

Office Assistant

Summer 2011

- Successfully managed all aspects of project documentation, including blueprints, selections paperwork, surveys, permits, utility placements, and filings for all assigned jobs

SKILLS

- Learning Bloomberg (basic), FactSet, and ISS-EVA Investor Express
- Microsoft Excel, Word, and PowerPoint
- Communication and team-work experience
- Management and scheduling understanding
- Budgeting and estimating experience

EXTRACURRICULAR

- Investments in Cryptocurrency/NFTs
- Technical analysis and portfolio management
- Trading stocks on Webull/equity markets/fixed income
- Analysis with TradingView
- Option and stock trading on TD Ameritrade: Think-or-Swim

Madeline Falkenberg

Milwaukee, WI | falkenb2@uwm.edu | (920) 264-4867

EDUCATION

University of Wisconsin-Milwaukee

Master of Science in Finance, Certificate in Investment Management

Cumulative GPA: 3.88 | Dean's List: 6/6 semesters

Bachelor of Business Administration in Finance

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes
- Finance 75% of tuition/living expenses through employment while a full-time student

Milwaukee, WI

Expected Graduation: May 2025

Graduation: Dec 2023

PROFESSIONAL EXPERIENCE

UMB Fund Services

Transfer Agency Intern

- Analyze and identify inaccuracies in shareholders' and institutions' provided documentation
- Compose professional letters to shareholders, providing clear instructions to rectify incorrect paperwork
- Utilize FINRA Broker Check to quality control accreditations of institutions, brokers, and investment advisors
- Maintain confidentiality and the handling of sensitive information in accordance with firm and SEC policies

Milwaukee, WI

May 2023 – Present

University Club of Milwaukee

Server/Outlets Manager

- Actively understand member dietary restrictions, preferences, and special requests to ensure a positive experience
- Quickly and accurately memorize orders and seat numbers during normal service and events up to 300 people
- Manage the ordering of products for Cabana food stand through oversight of weekly demand trends
- Prioritize learning of changing seasonal menus and rotating weekly specials while balancing other responsibilities

Brown Deer, WI

May 2022 – Present

Xiogenix

Project Coordinating Intern

- Processed invoices, credit card transactions, and purchase orders using QuickBooks, Excel, and CRM software
- Independently developed multiple process improvement projects for accounting, sales, and engineering teams
- Redesigned company forms and letterhead through research and translation of basic criteria
- Sought opportunities to understand the innovations and cutting-edge therapies in the regenerative medicine field

Milwaukee, WI

Jan 2023 – May 2023

Selected Project Experience

- **Initiating coverage report** for Artisan Partners Asset Management, Inc. (Ticker: APAM) **Fall 2023**
 - Conducting industry and competitive research to identify the company's business and financial drivers
 - Perform comparable company analysis, three-stage DCF analysis, and multiples regression analysis
- **Elmbrook Humane Society** **Upcoming: Spring 2024**
 - Analyze performance and positioning and present to a board for approximately \$5 mil in AUM

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet, and ISS-EVA Investor Express**
- **Microsoft Excel, Word, and PowerPoint**

EXTRACURRICULAR

Beta Gamma Sigma Business Honors Society, Vice President

Jun 2023 – Present

UWMAA Mentorship Program, Mentee

Jan 2023 – Present

Hobbies

- Boating, skiing, attending Milwaukee festival, orchestra, exploring German culture, gardening

Scholarships

- Heartland Funds DEI Scholarship recipient

May 2023

Ed Foote

Milwaukee, WI | Foote@uwm.edu | (414) 519-1421

EDUCATION

University of Wisconsin-Milwaukee

Graduate Certificate in Investment Management

Milwaukee, WI

Graduation: May 2025

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes

CFA Exam Level I Candidate, significant and continuing study toward the exam in Aug. 2023

Cornell University

B.A. Economics, Minor: Business

Ithaca, NY

Graduation: May 2021

- Four-year varsity athlete and two-years in Cornell Equity Research (including leadership)

EXPERIENCES

Riverwater Partners

Equity Research Intern

Milwaukee, WI

Starting Aug. 2023

- Conduct research on small and mid-cap equities with a focus on value
- Responsibilities include market updates, ESG analysis, and ad-hoc projects

Equity Investment Research – Sector Team Leader

Cornell Equity Research, Cornell University

Ithaca, NY

2020 – 2021

- Team leader and mentor for the finance sector
- Produced finance sector and CME Group (CME) reports
- Telecommunications sector analyst covering Verizon Communications (VZ) during junior year

Robert W. Baird

Private Wealth Management Intern

Milwaukee, WI

June 2020 – Aug. 2020

- Researched and wrote a 35-page report initiating coverage on Intercontinental Exchange (ICE)
- Created DCF and other valuation models using Excel, Thompson ONE, and S&P Capital IQ
- Competed in a 30-person stock market investment simulation

Encon United

Special Projects Assistant to the CEO & CFO Intern

Denver, CO

May 2019 – Aug. 2019

- Analyzed plant-employee Bonus and Incentive Plans to increase employee retention
- Analyzed Denver Cost of Living for use in union negotiations
- Financial analysis of existing equipment for use in repair/replace capital expenditure decisions

Selected Project Experience

- **Initiating coverage report** for Snap-on (Ticker: SNA) *Fall 2023*
 - Conducting industry and competitive research to identify the company's business and financial drivers
 - Performing comparable company analysis, three-stage DCF analysis, and multiples regression analysis
- **Elmbrook Humane Society** *Spring 2024*
 - Analyze performance and positioning and present to a board for approximately \$5 mil in AUM

TECHNICAL SKILLS

- **Wall Street Prep Cert. in Financial/Valuation Modeling | Columbia Univ. 6-month FinTech Boot Camp**
- **Bloomberg (basic), FactSet, Capital IQ, and ISS-EVA Investor Express**
- **VBA, Python (basic), SQL (basic), and website development | Microsoft Excel, Word, and PowerPoint**

EXTRACURRICULAR

Organizations

Current: CFA Society of Milwaukee, Cornell Club of Wisconsin (Board), Secure Futures (youth financial literacy)

College: Cornell Economics Society, Order of Omega (top 3% Greek Life), Chi Psi Fraternity (Treasurer)

Hobbies

My equity portfolio, news/information junkie, astronomy, wine tasting, movies, skiing, golf, ice camping, and biking

Felix Gerlach

Milwaukee, WI | fgerlach@uwm.edu | (208) 720-2866

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Cumulative GPA: 4.00 | Business Scholars Program | Dean's List: 4/4 semesters

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes
- Finance 100% of tuition/living expenses through employment and scholarships while a full-time student

Milwaukee, WI

Graduation: May 2025

Scholarships

Lubar Scholarship, renewable Lubar Scholarship based on academic achievement

Sept. 2021 – Present

Chancellor's Merit Scholarship, four year scholarship based on high school GPA

Sept. 2021 – Present

PROFESSIONAL EXPERIENCE

Practice Server

Administrator

Houston, TX

Dec. 2018 – Present

- Responsible for the organization of events with hundreds of thousands of dollars in prizes, sponsored by multi-million-dollar organizations and companies
- Research and secure event talent/players
- Organize staff team and enlist independent contractors on a per event basis
- Administer live events to ensure logistics and costs are executed as planned
- Act as primary line of communication between sponsors and talent
- Manage talent side marketing

Enjoy Winter

Rotating Assistant

Ketchum, ID

Aug. 2017 – Aug. 2018

- Managed physical inventory by completing inventory counts and reconciliation
- Assisted marketing team on campaigns for new product releases
- Analyzed consumer-based industry data to find market gaps
- Educated potential customers and merchandisers on product line at various cross-country skiing expos

Selected Project Experience

- **Initiating coverage report** for Schneider National, Inc. (Ticker: SNDR) **Fall 2023**
 - Conduct industry and competitive research to identify the company's business and financial drivers
 - Perform comparable company analysis, three-stage DCF analysis, and multiples regression analysis

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet, and ISS-EVA Investor Express**
- **Microsoft Excel, Word, and PowerPoint**
- **R (basic) and website development (basic)**

EXTRACURRICULAR

UWM - Lubar Black & Gold Committee

Fall 2021

- Student Representative
 - Participated in discussion regarding the school and student experience in an effort to improve student satisfaction and success campus wide

Hobbies

- Soccer, Cross-country skiing

Sebastian Gregor

Milwaukee, WI | email sgregor@uwm.edu | (414) 915-1226

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Major GPA: 3.29 | Business Scholars Program

Milwaukee, WI

Graduation: May 2025

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes

PROFESSIONAL EXPERIENCE

Sherwin Williams

Store/Sales Associate

- Responsible for selling products through suggestive selling and sharing product knowledge
- Entrusted with making bank deposits and opening/closing the store
- Maintain key customer relationships while analyzing future needs
- Assist in organizing products and cleanliness of store
- Played a key role in increasing homeowner sales by 20% in 2022

Milwaukee, WI

June 2022 – Present

Dale Painting Inc

Exterior Painter

- Demonstrated exceptional attention to detail in order to meet customer needs
- Provided excellent customer service, while being results driven
- Team player with a positive can-do attitude in meeting key business objectives

Milwaukee, WI

May 2021 – Aug. 2021

Rosati's Pizza

Delivery Driver

- Efficiently managed a high volume of deliveries while juggling school commitments
- Consistently met delivery deadlines
- Maintained accurate cash handling during deliveries and while operating the cash registers

Milwaukee, WI

Oct. 2019 – April 2021

Selected Project Experience

- **Initiating coverage report** for Marten Transport Ltd (Ticker: MRTN) **Fall 2023**
 - Conduct industry and competitive research to identify the company's business and financial drivers
 - Perform comparable company analysis, three-stage DCF analysis, and multiples regression analysis

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet, and ISS-EVA Investor Express (basic)**
- **Microsoft Excel, Word, and PowerPoint**
- **Website development (basic)**

EXTRACURRICULAR

- Basketball, camping, and language learning
- Interested in investing since 2020 after opening my first brokerage account and watching my brother become an investment professional

Jacob Johnson

Milwaukee, WI | email john4769@uwm.edu | (920) 637-1842

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Milwaukee, WI

Graduation: May 2025

Cumulative GPA: 3.40 | Major GPA: 3.45

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes
- Finance 75% of tuition/living expenses through employment while a full-time student

PROFESSIONAL EXPERIENCE

Robert W. Baird

Financial Operations Intern

Milwaukee, WI

January 2023 – May 2024

- Handled thousands of dollars daily and helped facilitate accurate and timely payment of commissions
- Worked on corporate team that aids the largest sector of a company which manages \$375 in AUM for clients

White Construction

Project Laborer

Beaver Dam, WI

June 2022 – August 2022

- Assisted a project manager in completing a multi-million dollar contract on a strict schedule
- Helped to coordinate a large team spanning multiple cities while accounting for many variables such as weather and traffic

Kwik Trip

Guest Service Team Member

Neenah, WI

September 2020 – January 2022

- Helped to grow and maintain a store in the top 1% of revenue for the company
- Worked in a high-paced, team environment, communicating daily with hundreds of customers, stores, and at times, executives
- Sales experience by focusing on upgrading and adding to customers' sales

Selected Project Experience

- **Initiating coverage report** for WEC Energy Group (Ticker: WEC) **Fall 2023**
 - Conducted industry and competitive research to identify the company's business and financial drivers
 - Performed comparable company analysis, 3-stage DCF analysis, and multiples regression analysis

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet (basic), and ISS-EVA Investor Express**
- **Microsoft Excel, Word, PowerPoint, Power Automate, Power BI**
- **VBA, R (basic), SQL, RPA (basic)**

EXTRACURRICULAR

Student Investment Club

Energy Analyst

December 2022 – Present

- Engaged in managing a real portfolio worth approximately \$120,000; enhancing educational experience with real-life application

Delta Sigma Pi Professional Business Fraternity

VP of Corporate Relations

September 2022 – Present

- Helped to foster the study of business in universities; to encourage scholarship, social activity, and the association of students for their mutual advancement by research and practice; to promote closer affiliation between the commercial world and students of commerce; and to further a higher standard of commercial and culture and the civic and commercial welfare of the community

Hobbies

- Football, golf, and basketball
- Interested in investing since 2016 when I first started a portfolio with my father and conducted monthly meetings managing this portfolio

Max Lavin

Milwaukee, WI | email mlavin@uwm.edu | (612) 716-0093

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Cumulative GPA: 3.5 | **Deans list:** 3/4 semesters

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
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- Finance 75% of tuition/living expenses through employment while a full-time student

Milwaukee, WI

Graduation: May 2025

PROFESSIONAL EXPERIENCE

The Cheesecake Factory

Baker, Designated Trainer

- Prepare various desert orders
- Train new hires how to operate and maintain the bakery and troubleshoot various problems that may arise throughout a shift
- Assist customers to maximize their restaurant experience

Glendale, WI

September 2022 – Present

Sneaker Reselling

Self Employed Sneaker Business

- Researched upcoming sneaker releases to find opportunities for profit
- Coordinated meetings with prospective buyers to negotiate prices
- Market inventory through various platforms

Minneapolis, MN

April 2017 – Present

Landscaping

Collaborated with partners to start a landscaping company

- Mastered various equipment to complete the required tasks
- Engaged in the customer bid process to maximize profitability
- Demonstrated work ethic through long hours on hot days

Richfield, MN

April 2020 – August 2021

Selected Project Experience

- **Initiating coverage report** for Plexus Corporation (Ticker: PLXS) **Fall 2023**
 - Conducted industry and competitive research to identify the company's business and financial drivers
 - Performed comparable company analysis, three-stage DCF analysis, and multiples regression analysis

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet (basic), and ISS-EVA Investor Express**
- **Microsoft Excel, Word, PowerPoint**
- **R (basic)**

EXTRACURRICULAR

Student Investment Club

Technology Analyst

- Assisted in managing a real portfolio worth approximately \$120,000
- Research technology companies to buy and sell from the portfolio

January 2023 – Present

Delta Sigma Pi Professional Business Fraternity

VP of Fundraising

- Identify opportunities and collaborate with various businesses and people in the surrounding community to raise money for Delta Sigma Pi

January 2023 – Present

Hobbies

- Golf, fishing, baseball, hockey

Kevin Marchewka

Milwaukee, WI | marchew3@uwm.edu | (414) 412-7267

EDUCATION

University of Wisconsin-Milwaukee

Milwaukee, WI

Bachelor of Business Administration in Finance, Certificate in Investment Management *Graduation: May 2025*

Cumulative GPA: 4.00 | Business Scholars Program | Honors College | Dean's List: 4/4 semesters

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
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 - Analyze securities over multiple asset classes

Relevant Coursework: Intermediate Accounting, Macro to Financial Markets, Investment Finance (Fall 2023)

PROFESSIONAL EXPERIENCE

Alpha Investment Consulting Group

Milwaukee, WI

Research Analyst Intern

May 2023 - Present

- Conduct investment category screens to explore potential allocation of funds (\$4B of AUM)
- Attend due diligence meetings with fund managers to discuss fund strategy, performance, and changes
- Generate monthly return reports of multiple asset classes to analyze performance

ReUse Thrift

Milwaukee, WI

Operations Associate Intern

June 2020 - December 2021

- Photographed, shipped, and organized secondhand inventory being resold online
- Generated an additional \$4,000 of revenue in three months by taking inventory to festivals
- Trained a new employee in the daily operations of the business
- Researched trends and the market value of inventory

Selected Project Experience

- **Initiating coverage report** for Wisconsin Company Rexnord (Ticker: RXN) **Fall 2023**
 - Conduct industry and competitive research to identify the company's business and financial drivers
 - Perform comparable company analysis, three-stage DCF analysis, and multiples regression analysis
- **Correlation Project** for Macro to Financial Markets Class **Spring 2023**
 - Analyzed the relative performance of two financial assets and its relationship to an economic variable using FactSet Interactive Charting and Excel
 - Recommended a long and short position using technical indicators

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet, and ISS-EVA Investor Express**
- **Microsoft Excel, Word, and PowerPoint**

EXTRACURRICULAR

Student Investment Club

September 2021 - Present

Vice President and Consumer Discretionary Analyst

- Assist in managing a \$130,000 portfolio
- Listen to guest speakers that work in investment-related fields

Hobbies

- Tennis, Skiing, Running, Movies, and Photography

Other

- Fluent in Polish

Alexander Mason

Milwaukee, WI | mason24@uwm.edu | (815) 355-3759

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Cumulative GPA: 3.48 | Dean's List: 2/4 semesters

Milwaukee, WI

Graduation: May 2025

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)

- 21-month CFA University Affiliated Program for a select group of students
- Work on multiple portfolios with a combined value over \$10MM and present to investment boards
- Analyze securities over multiple asset classes

Adventis Financial Modeling Level I

Jul. 2023

PROFESSIONAL EXPERIENCE

Mass Interact – Google Trusted Agency

Sales Intern

Chicago, IL

Apr. 2023 – Jul. 2023

- Conduct market research to generate leads and identify potential clients
- Develop interpersonal and communication skills through daily interactions with clients and internal teams
- Manage and update CRM software, ensuring accurate and up-to-date client information

Biltmore Country Club

Cook

Barrington, IL

Jun. 2023 – Aug. 2023

- Assisted executive chefs in a fast-paced, high intensity work environment
- Collaborated with team members to expedite food preparation
- Broadened excellent time management skills

Fox 14 Marina

Dock Attendant

Algonquin, IL

Apr. 2018 – Jun. 2023

- Facilitated exceptional written and verbal communication skills, fostering effective and clear interactions
- Demonstrated precise attention to detail, effectively managing day-to-day duties with comprehensive knowledge
- Proactively anticipated customer needs and consistently delivered exceptional service, maintaining high standards

Selected Project Experience

- **Initiating coverage report** for Fiserv, Inc (Ticker: FI) *Jun. 2023 – Present*
 - Conduct industry and competitive research to identify the company's business and financial drivers
 - Perform comparable company analysis, 3-stage DCF analysis, and multiples regression analysis

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet and ISS-EVA Investor Express**
- **Microsoft Excel, Word, and PowerPoint**
- **Python (basic)**

EXTRACURRICULAR

Student Investment Club

Head Portfolio Manager

Sep. 2022 – Present

- Lead a team of 22 members, overseeing all investment activities and strategies
- Present investment updates of the clubs' fund of \$130,000 with a portfolio that includes various stocks and ETFs

Delta Sigma Pi – Xi Chi

Vice President of Scholarships and Awards

Jan. 2023 – Present

- Implement targeted study groups based on members' strengths to foster collaboration and academic success
- Present scholarships to members, while also recognizing members for their achievements and excellence

Hobbies

- Competitive golf, soccer, weightlifting and reading

Daniel Muellner

Milwaukee, WI | muellnerdanny@gmail.com | (224) 725-8108

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Cumulative GPA: 3.45 | Business Scholars Program | Dean's List: 3/4 semesters

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes
- Finance 100% of living expenses through employment while a full-time student

Milwaukee, WI

Graduation: May 2025

PROFESSIONAL EXPERIENCE

Des Plaines Park District

Cashier & Supervisor

- Oversaw cash handling procedures, ensuring accuracy and accountability for large sums of money
- Led a team of employees, providing guidance, training, and performance evaluations
- Assisted in analyzing financial data to identify trends, improve profitability, and reduce costs
- Handled complex financial transactions, such as returns, exchanges, and processing refunds
- Educated customers on financial products, services, and promotions to drive sales

Des Plaines, IL

May 2022 – Aug. 2023

University of Wisconsin-Milwaukee Housing

Front Desk & Security

- Provided administrative support, such as maintaining records and organizing financial documents
- Responded to inquiries, resolved issues, and provided financial guidance to enhance customer satisfaction
- Balanced full-time studies with demanding work, showcasing strong time management and organizational skills
- Utilized software and office tools for data entry, report generation, and documentation management
- Mentored and trained new staff members on financial security protocols and customer service practices

Milwaukee, WI

Oct. 2022 – May 2023

Des Plaines Park District

Attendant & Starter for Golf Facility

- Personalized customer interactions based on understanding their preferences and needs
- Exhibited strong communication skills through active listening, feedback and idea sharing with team members
- Received positive feedback from customers, colleagues, or management for outstanding performance

Des Plaines, IL

Jul. 2020 – Aug. 2021

Selected Project Experience

- **Initiating coverage report** for Alliant Energy Corporation (Ticker: LNT) **Fall 2023**
 - Conducted industry and competitive research to identify the company's business and financial drivers
 - Performed comparable company analysis, three-stage DCF analysis, and multiples regression analysis

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet, and ISS-EVA Investor Express**
- **Microsoft Excel, Word, and PowerPoint**

EXTRACURRICULAR

Student Investment Club

Sep. 2021 - Present

- Assisted in management of a \$130,000 diversified equity portfolio
- Presented investment recommendations, effectively communicating complex financial concepts to club members
- Collaborated to track and evaluate investment performance, providing valuable insights for decision-making

Hobbies

- Playing musical instruments, engaging in sports, and movies
- Interested in investing since 2020 when I discovered that my family didn't have any money invested in stocks

Zahra Nemati

Fox Point, WI | nematin2@uwm.edu | 312-810-8809

EDUCATION

University of Wisconsin-Milwaukee

Milwaukee, WI

Bachelor of Business Administration in IT Management, Certificate in Investment Management Graduation: May 2025

Cumulative GPA: 4.00 | Major GPA: 4.00 | Dean's List: 2/2 semesters

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes

Milwaukee Area Technical College

Mequon, WI

Associate of Science

August 2021– May 2022

Cumulative GPA: 4.00 | Major GPA: 4.00 | President's List: 2/2 semesters

- Financed 100% of living expenses through employment while a full-time student

PROFESSIONAL EXPERIENCE

Robert W. Baird

Milwaukee, WI

Business Process Analyst Intern

May 2023 – Present

- Conduct workflow analysis and collaborate closely with process owners to identify areas for improvement
- Complete small-scale projects for department which include process reviews and custom solution development
- Collaborates with business process analysts to enhance client experience, mitigate risks, and improve processes

Sterling Pharma Solutions

Germantown, WI

Information Technology Intern

May 2022 – August 2022

- Performed hardware and software support for 200+ users in-person and remotely
- Completed imaging and re-imaging of more than 50 PCs to an enterprise PC ensuring efficiency in process
- Maintained an inventory database to track all IT assets owned by the company
- Collaborated with various departments to identify and fulfill their unique IT requirements
- Resolved and closed over 100 IT tickets using problem-solving and technical skills to troubleshoot issues

Milwaukee Area Technical College

Mequon, WI

Career Hub Ambassador

August 2021 – May 2022

- Assisted students with questions regarding academic programs, application process, and support systems
- Collected student information and updated department databases to monitor progress and goal fulfillment
- Collaborated with college faculty to analyze and solve problems and enhance student achievement
- Conducted research and fostered relationships with employers to help students secure job opportunities

T.J. Maxx

Menomonee Falls, WI

Retail Sales Associate

October 2020 – August 2021

- Answered questions about store policies and resolved customer concerns both in-person and on phone
- Calculated inventory and restocked supplies

Selected Project Experience

- **Initiating coverage report** for Brady Corporation (Ticker: BRC) **Fall 2023**
 - Conducted industry and competitive research to identify the company's business and financial drivers
 - Performed comparable company analysis, three-stage DCF analysis, and multiples regression analysis

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet, and ISS-EVA Investor Express**
- **Microsoft Excel, Word, and PowerPoint**
- **Python (Advanced), Java (Basic)**

AWARDS

Manske Family Scholarship, Fall 2023-Spring 2024, awarded to business students demonstrating leadership skills

Ethics Case Competition Award, Spring 2023

UWM Excellence Scholarship, Fall 2022-Spring 2023

Joseph Reitmeyer

Milwaukee, WI | reitmey3@uwm.edu | (920) 609-1136

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Cumulative GPA: 3.28/4.00 | **Major GPA:** 3.41/4.00 | Dean's List: 1/4 semesters

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes
- Finance 30% of tuition/living expenses through employment while a full-time student

Milwaukee, WI

Graduation: May 2025

PROFESSIONAL EXPERIENCE

Pilot Project Brewing

Server/Bartender

- Demonstrate appropriate customer service for new employees
- Collaborate with team members at high-valued events
- Maximize profits per customer through education of offerings of the menu

Milwaukee, WI

May 2023 – Present

On Tap

Server

- Served customers well, and in turn, maximized profits
- Trained staff on company technology
- Problem solved issues as they arose with tact and diplomacy
- Created an enjoyable experience for customers through delivering top notch service

Milwaukee, WI

June 2022 – May 2023

Hinterland Brewery

Server

- Established a customer base that frequented the restaurant
- Achieved an elevated level of customer service while managing multiple priorities
- Assisted with the brewing process
- Trained and mentored less experienced servers

Green Bay, WI

May 2019 – Jan. 2022

Selected Project Experience

- **Initiating coverage report** for Manitowoc Company, Inc. (Ticker: MTW) **Fall 2023**
 - Conducted industry and competitive research to identify the company's business and financial drivers
 - Performed comparable company analysis, three-stage DCF analysis, and multiple regression analysis

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet, and ISS-EVA Investor Express**
- **Microsoft Excel, Word, PowerPoint**
- **Photoshop**

EXTRACURRICULAR

Student Investment Club

Jan. 2023 – Present

- Invest and maintain a portfolio with \$130,000 in various stocks and ETFs
- Network with business professionals and discuss topics surrounding investment management

Hobbies

- Cooking, frisbee golf, playing saxophone, and guitar
- Interested in business and investing since I met with my father's financial planner in 2019

Jacob Sprister

Milwaukee, WI | 920-252-5150 | Spriste5@uwm.edu

EDUCATION

University of Wisconsin – Milwaukee

Bachelor of Business Administration in Finance, Certificates in Investment Management and Real Estate

Cumulative GPA: 3.78/4.00 | Deans list: 4/4 semesters

Skills: Microsoft Excel, PowerPoint, Word, FactSet, Bloomberg Terminal, and ISS-EVA Investor Express
Financed 98% of tuition/living expenses through employment while a full-time student

Milwaukee, WI

Graduation: May 2025

Investment Management Certificate Program

Selective Program

- 21-month CFA University Affiliated Program for a select group of students
- Work on portfolios with over \$10 mil and present to investment boards
- Analyze securities over multiple asset classes

Milwaukee, WI

Sep 2023 – Present

Real Estate Certificate

Certificate Program

- Courses in real estate finance, valuation, property development, and real estate law
- Exposure to current real estate market trends and its impact on the economy

Milwaukee, WI

Sep 2022 – Present

Business Scholars Program

Selective Program

- Interacting and connecting with Lubar College's top faculty and fellow students, building professional networks that will last long after graduation
- Academically rigorous hands-on learning, providing ongoing challenges to develop and strengthen essential skill sets

Milwaukee, WI

Sep 2022 – Present

EXPERIENCE

Jimmy Johns

Team Member / In shop

- Consistently meet demands of high-volume sandwich production, efficiently handling online, in-shop, and drive-thru orders
- Utilize strong communication skills and effective time management to engage with customers

Milwaukee, WI

Mar 2023 – Present

Enviro Sealers LLC

Laborer / Operator

- Successfully restored asphalt driveways and parking lots on various private and commercial properties
- Demonstrated effective communication and logistical skills, maintaining strong relationships with customers
- Effectively managed time and collaborated in a team environment to accomplish challenging projects within specified deadlines

Madison, WI

Summer 2021 & 2022

DoorDash

Delivery Driver

- Ensured prompt and efficient delivery of food from numerous restaurants across Milwaukee, Oshkosh, and Appleton
- Demonstrated strong time management and communication skills while working with customers

Milwaukee, WI

Dec 2021 – May 2022

LEADERSHIP ACTIVITIES

Student Investment Club

Member

- Decide where to invest stocks by pitching and voting on stock presentations and ideas
- The current fund manages \$135,000
- Expanding knowledge of investing, finance, and the economy with weekly meetings

Milwaukee, WI

Sep 2023 – Present

Panther Real Estate Club

Member

- Analyze real estate trends and current implications for financial markets
- Tour properties around Milwaukee while gaining exposure to how buildings are managed and profitable
- Network with respected industry professionals to learn more about real estate and potential career opportunities

Milwaukee, WI

Nov 2021 – Present

America Scores

Volunteer

- Assisted students with homework and played games for an afterschool program
- Managed a classroom with another volunteer and helped coordinate activities

Milwaukee, WI

Feb 2022 – Apr 2022

Jonathan Strange

Milwaukee, WI | jonathanstrange55@gmail.com | (262) 505-0721

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Milwaukee, WI

Graduation: May 2025

Cumulative GPA: 3.93 | Major GPA: 3.93 | Business Scholars Program | Honors Student | Dean's List: 3/4 semesters

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes
- Finance 100% of living expenses through employment while a full-time student

Adventis Financial Modeling

Aug. 2023

PROFESSIONAL EXPERIENCE

Elite Energy Distribution

Financial Controller

Brookfield, WI

Dec. 2022 – Present

- Perform the accounting and internal auditing for the company
- Analyze financial data and create financial reports
- Budget capital expenses and plan capital funding
- Meet with executives, investors, and global clients
- Aided in the application and interviews for Apple's Impact Accelerator Program

Elite Energy Distribution

Receivables/Payables Manager

Brookfield, WI

May 2022 – Nov. 2022

- Issue invoices and purchase orders on a computerized system
- Collect receivables and pay payables
- Create aging reports and contact customers about overdue receivables

Elite Energy Distribution

Operations Lead

Brookfield, WI

May 2017 – April 2022

- Managed inbound and outbound products through inventory reports and shipping logs
- Processed and packaged inventory to be available for sale

Selected Project Experience

- **Initiating coverage report** for Harley-Davidson, Inc. (Ticker: HOG-US) **Fall 2023**
 - Conducted industry and competitive research to identify the company's business and financial drivers
 - Performed comparable company analysis, three-stage DCF analysis, and multiples regression analysis

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet, and ISS-EVA Investor Express**
- **Microsoft Excel, Word, and PowerPoint**
- **R programming, Python (basic)**

EXTRACURRICULAR

Student Investment Club

Oct 2022 - Present

- Consumer Staples analyst

Hobbies

- Rock climbing, golfing, collecting classic cars
- Passion for investing and the financial markets grew from operating a minority, small business

List Scholarships

- Chancellor's Merit Tier1, Academic Excellence Scholarship HEAB, Prasad Merit

Olivia Webers

Milwaukee, WI | oliviawebers14@gmail.com | (262) 455-6854

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Cumulative GPA: 3.82/4.00 | Business Scholars Program | Dean's List: 4/4 semesters

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes
- Financing 100% of tuition/living expenses through summer and semester employment while a full-time student

Milwaukee, WI

Graduation: May 2025

PROFESSIONAL EXPERIENCE

Uline

Jr. Credit Analyst

- Assess signs of possible fraud to determine account validity and protect company assets
- Analyze customer payment history to set and adjust credit limits
- Analyze a high volume of orders requiring credit review and answering over 50 incoming calls per day

Pleasant Prairie, WI

June 2023 – Present

Uline

Jr. Tax Exemption Analyst

- Analyzed sales tax exemption certificates for accuracy and contacted customers if documentation was incorrect
- Calculated and processed sales tax credits and resolved tax write-offs based on exemption documentation

Pleasant Prairie, WI

June 2022 – Jan. 2023

Kwik Trip Inc.

Guest Service Coworker

- Itemized and totaled customer merchandise at the checkout counter
- Stocked shelves, racks, cases, bins, and tables with new or transferred merchandise

Pleasant Prairie, WI

Starting May 2019

Selected Project Experience

- **Initiating coverage report** for Generac (Ticker: GNRC) **Fall 2023**
 - Conducted industry and competitive research to identify the company's business and financial drivers
 - Performed comparable company analysis, three-stage DCF analysis, and multiples regression analysis

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet, and ISS-EVA Investor Express**
- **Microsoft Excel, Word, PowerPoint, and Access (basic)**
- **R Programming (basic), Power BI (basic), and SQL (basic)**

EXTRACURRICULAR

Student Investment Club

Member

- Assist in the management of a \$100,000 diversified equity portfolio
- Participate in weekly meetings on sector performance, market trends, and portfolio adjustments
- Delivered weekly presentations on \$COST, \$BRK-B, and \$JPM, as an analyst for two semesters

Sept. 2021 – Present

Women in Business Club

Member

- Participate in weekly meetings that facilitate career development and networking
- Engage in community outreach and volunteer activities, social events, and annual fundraising

Jan. 2023 – Present

UWM Club Volleyball Team

Treasurer

- Create budgets and recommend financial strategies for the club
- Travel throughout the state for tournaments and compete against other universities' club volleyball teams

Sept. 2022 – Present

Shane Wiegert

shanewiegert17@gmail.com | (920) 850-4197 | linkedin.com/in/shane-wiegert/

EDUCATION

University of Wisconsin-Milwaukee

Master of Business Administration, Certificate in Investment Management

Cumulative GPA: 4.00

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Monitor and manage portfolios with over \$10 mil and present performance to investment boards
 - Analyze various securities in multiple asset classes
- Finance 100% of tuition/living expenses through employment while a full-time student

Milwaukee, WI

Graduation: May 2025

University of Wisconsin-Whitewater

Bachelor of Business Administration in Finance, Business Analytics

Cumulative GPA: 3.97 | Summa Cum Laude | Chancellor's Scholar | Dean's List: 8/8 semesters

- **Applied Investment Program** (appliedinvestments.org)
 - 10-month program for a select group of students
 - Researched, pitched, and covered several securities in a \$1 mil portfolio
 - Competed in the CFA Institute Investment Research Challenge

Whitewater, WI

Graduation: May 2023

Wall Street Prep Financial Modeling Certification

May 2022

Bloomberg Market Concepts Certification

May 2022

FactSet Core Products Certification

May 2022

PROFESSIONAL EXPERIENCE

U.S. Venture, Inc.

Treasury Intern

Appleton, WI

May 2022 – Nov. 2022

- Maintained daily cash position to make informed borrowing decisions on \$125 mil revolver
- Assisted bank account restructuring, monitored internal and external controls, and completed ad-hoc projects

Selected Project Experience

- **CFA Institute Investment Research Challenge** (Exact Sciences, ticker EXAS) *Nov. 2022 – Feb. 2023*
 - Conducted industry and competitive research to identify the company's business and financial drivers
 - Performed comparable company analysis, three-stage DCF analysis, and multiples regression analysis
 - Wrote professional research report and presented to a board of investment professionals
- **Elmbrook Humane Society** *Oct. 2023 – Present*
 - Analyze performance and positioning and present to a board for approximately \$5 mil in AUM

TECHNICAL SKILLS

- Bloomberg, FactSet, and ISS-EVA Investor Express
- Microsoft Excel, Word, PowerPoint, Power BI, and Outlook
- Python (basic), financial statement analysis

EXTRACURRICULAR

UW-Whitewater Financial Management Association

Sep. 2019 – Dec. 2022

UW-Whitewater Investment Group

Sep. 2020 – May 2021

Hobbies

- Basketball, golf, and hunting
- Interested in investing since first economics class in 2018

Scholarships

- UW-Whitewater Chancellor's Scholarship
- U.S. Venture, Inc. College Scholarship

Books

- *The Little Book of Valuation* *Dec. 2022*
- *Uncommon Profits in Common Stocks* *Jul. 2022*