

Investment Management Certificate Program (IMCP)

University of Wisconsin-Milwaukee

Lubar School of Business

www.lubar.uwm.edu/IMCP

Class of 2024 Resume Packet:

Zach Bachinski
Jack Cyganiak
Joseph Dardis
Drake Dorfner
Erik Genskow
Ethan Huber
Andrew May
Isaac Monday
Alexander Perez
Owen Phillips
Bryce Schneider
Justin Thimmesch
Emily Zimmer

Contact Information:

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Zach Bachinski

Milwaukee, WI | bachins2@uwm.edu | (414) 520-4215

EDUCATION

University of Wisconsin-Milwaukee

Milwaukee, WI

Bachelor of Business Administration in Finance, Certificate in Investment Management

Graduation: May 2024

Cumulative GPA: 4.00 | Major GPA: 4.00 | Business Scholars Program | Dean's List: 6/6 semesters

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on \$10 mil of portfolios, and present performance, attribution, and strategies to investment boards
 - Analyze securities over multiple asset classes
- Finance 50% of tuition/living expenses through employment while a full-time student

PROFESSIONAL EXPERIENCE

Northwestern Mutual

Milwaukee, WI

Investment Operations Intern

April 2023 – Present

- Ensure investment data is accurate, complete, and timely
- Review and reconcile cash, investment positions and critical attributive investment data
- Respond to internal and external inquiries regarding investment holdings and activities
- Keep records up to date and perform reconciliation of physical securities

Strattec Security Corporation

Milwaukee, WI

Accounting Intern

May 2021 – April 2023

- Assisted financial analysts by working on a variety of weekly and monthly projects to ensure company financials and data were accurate and up to date
- Collected company payments and transactions to prepare tax documents
- Facilitated invoices by indexing into the company system, matching to accompanied receipt, and preparing them for payment
- Contacted and communicated with vendors to discuss open invoices and payment plans

Lowes Companies

Franklin, WI

Sales Associate

May 2020 – Aug. 2020

- Helped to assist customers on the sales floor and promote *Lowe's Pro Services*
- Recorded inventory of newly arrived merchandise in receiving warehouse

Selected Project Experience

- **CFA Institute Research Challenge** **Winter 2023**
 - Researched \$OSK and assigned investment rating via written report and presentation
- **Elmbrook Humane Society** **Spring 2023**
- **Initiating coverage report** for Artisan Partners (Ticker: APAM) **Summer – Fall 2022**
 - 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, and ISS-EVA Investor Express**
- **Microsoft Excel, Word, and PowerPoint**

EXTRACURRICULAR

Student Investment Club

Sep. 2020 – Sep. 2021

- Sector analyst for consumer staples and consumer discretionary as part of a \$100,000 diversified portfolio
- Delivered weekly presentations on \$COST, \$DORM, \$KO, and \$TGT

Hobbies

- Basketball (Bucks) and soccer (Arsenal FC)
- Film, cinema, and photography

Scholarships

- Dean's Scholarship
- Northwestern Mutual Scholars Scholarship
- BDO America Scholarship

Jack Cyganiak

Milwaukee, WI | cygania5@uwm.edu | (414) 416-4501

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration: Finance, Certificate in Investment Management

Cumulative GPA: 3.77 | Business Scholars Program | Dean's List: 8/8 semesters

Milwaukee, WI

Graduation: May 2024

- **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

PROFESSIONAL EXPERIENCE

Deutsche Bank

Incoming Investment banking Analyst Intern

- Analyze detailed corporate and financial information
- Creating statistical exhibits that analyze comparative financial performance
- Building models to illustrate projected financial results and value of companies
- Participating in the execution of financing and M&A transactions

Jacksonville, FL

May 2023 – August 2023

Fifth Third Bank

Commercial Middle Market Intern

- Analyze financial statements to evaluate risk
- Conduct and manage portfolio accounts from existing clients
- Developed probability of default models
- Responsibilities include market updates, performance reviews, and ad-hoc projects

Chicago, IL

May 2022 – August 2022

First Federal Bank of Wisconsin

Financial Analyst Intern

- Analyzed and developed financial models for the banks underwriting team
- Participated in financing mergers and acquisitions transactions
- Developed leverage buyout models for the bank's mergers and acquisition team
- Responsible for integrating bank systems when First Federal bought Michell Bank

Milwaukee, WI

June 2021 – May 2022

Selected Project Experience

- **Initiating coverage report** for Kohl's Corporation (Ticker: KSS) Summer/Fall 2022
 - 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, FactSet, and ISS-EVA Investor Express
- Microsoft Suites, Google Suites, Adobe, Python, R-Studios

EXTRACURRICULAR

Student Investment Club

Member

- Conducted equities research on for the retail sector

Joseph Dardis

Milwaukee, WI | jndardis@uwm.edu | (920) 517-7428

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management.

Milwaukee, WI

Graduation: May 2024

Cumulative GPA: 3.29 | Major GPA: 3.32

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
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 - Analyze securities over multiple asset classes
- Finance 80% of tuition/living expenses through employment while a full-time student

PROFESSIONAL EXPERIENCE

Physicians Realty Trust (NYSE: DOC)

Credit and Research Intern

Milwaukee, WI

Starting Apr. 2023

- Analyzed financial statements of healthcare tenants to determine ability to meet future financial obligations
- Researched and wrote about the news on tenants to create a news report for executives
- Created a program in python to expediate news search for existing tenants

McCarthy Grittinger Financial Group

Income Tax Intern

Milwaukee, WI

Jan. 2023 - Apr. 2023

- Prepare personal income tax returns for clients
- Learned the importance of rebalancing portfolios using real client data

Menards Inc.

Delivery Coordinator

Waukesha, WI

Sept. 2020 - Apr. 2023

- Organize and check off 20 deliveries daily
- Invest time in organization to increase productivity and limit future issues
- Communicate to customers and 3rd party hauler using email and phone calls

Selected Project Experience

- **Initiating coverage report** for Rockwell Automation (Ticker: ROK) **Fall 2022**
 - 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
- **Elmbrook Humane Society** **Spring 2023**
 - Analyzed 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**
- **R-studio (basic), Python(basic)**

EXTRACURRICULAR

Student Investment Club

Sector Analyst

Sept 2021 – May 2022

- Help manage \$130,000 in equities and ETFs
- Analyze energy and utility sector data
- Create bi-weekly PowerPoint presentations and present on the performance of our portfolio's holdings

Hobbies

- Beach volleyball, golf, basketball, and listening to music/podcasts (Pardon My Take, Revisionist History, and Wall Street Week)

Drake Dorfner

Milwaukee, WI | ddorfner@uwm.edu | (414) 426-0453

EDUCATION

University of Wisconsin-Milwaukee

BBA in Finance & Accounting, BA in Economics, Certificate in Investment Management

Milwaukee, WI

Graduation: Dec 2024

GPA: 3.50

- **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 \$10M, and present performance, attribution, and strategies to investment boards
 - Analyze securities over multiple asset classes
- Finance 100% of tuition/living expenses through employment while a full-time student

Microsoft Excel Certification

Apr. 2022

PROFESSIONAL EXPERIENCE

Robert W. Baird

Financial Analyst Intern

Milwaukee, WI

Mar. 2023 – Present

- Financial planning and analysis for Institutional Equity Research, Investment Banking, and Fixed Income teams
- Independently designed a PowerBI dashboard for exclusive use by the CFO and Director of Finance

US Bancorp

Investment Services Analyst

Milwaukee, WI

Jun. 2022 – Mar. 2023

- Generate a variety of analysis reports and contributed to the expense, audit, and compliance responsibilities for annual reporting of 11 mutual funds with cumulative AUM of ~\$2B
- Independently design Excel spreadsheets to automate analysis tasks

Northwestern Mutual

Financial Representative Intern

Milwaukee, WI

May 2021 – Dec. 2021

- Provide customers with expertise in insurance products with exceptional customer service

Selected Project Experience

- **Initiating coverage report** for MGIC Investment Corporation (Ticker: MTG) **Fall 2022**
 - 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 (API as well), FactSet (API as well), and ISS-EVA Investor Express**
- **Microsoft Excel, Word, PowerPoint, and PowerBI**

EXTRACURRICULAR

Student Investment Club

Board Member (Portfolio Manager) & Equity Research Analyst

Sep. 2021 – Mar. 2023

- Responsible for management of \$110k student endowment fund
- Successfully pitched Berkshire Hathaway (NYSE: BRK-B)

CFA Institute Research Challenge

Local Competition Champion

Spring 2023

- Conducted a research report on Oshkosh Corp (NYSE:OSK) and presented the findings to a panel of judges.

Erik Genskow

Milwaukee, WI | egenskow@uwm.edu | (608) 338-7975

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Milwaukee, WI

Graduation: May 2024

Cumulative GPA: 3.89 | Business Scholars Program | Dean's List: 6/6 semesters

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
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 - Analyze securities over multiple asset classes

PROFESSIONAL EXPERIENCE

Crabel Capital Management

Quantitative Research Intern

Milwaukee, WI

June – August 2023

- Developed and back tested trading strategies based on independent research and managers guidance
- Learned about behavioral and systematic tendencies in markets
- Utilized mathematical and statistical techniques to analyze large scale data sets and make detailed observations

Johnson Controls

Pricing Intern

Milwaukee, WI

May – August 2022

- Completed Excel work with sales data to identify best discounts for products while maximizing price realization
- Competed in Innovation Challenge presenting renewable energy solutions to executives and managers
- Learned from pricing team about price structure within JCI and gained valuable business skills and insights

Landscape Architecture Inc.

Landscape Specialist

Madison, WI

May – August 2021

- Worked with a team creating patios, retaining walls, gardens, walkways, watering systems and lighting systems
- Gained experience working with various types of construction machinery & vehicles
- Offered solutions and advice to problem solve with clients when they wanted to change details in a project

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet, and ISS-EVA Investor Express**
- **Microsoft Excel, Word, and PowerPoint**
- **Experience with R studio and technical equity and currency market analysis**

EXTRACURRICULAR

Student Investment Club

Real Estate Analyst

January 2022 – May 2022

- Assist in the management of a \$100,000 diversified equity portfolio
- Present bi-weekly on sector performance, market trends, and portfolio adjustments
- Maintain up-to-date knowledge of geopolitical and regulatory environments

Hobbies

- Playing many sports including intermural soccer for UW-Milwaukee
- Hiking and exploring the outdoors
- Interested in investing since 2020 when I learned about currency trading and created an account with Robinhood

Scholarships

Robert W. Baird Business Scholars Scholarship – IMCP Scholarship – LSB Alumni Fund Business School Scholarship

Ethan T. Huber

Grafton, WI | ethanthuber@outlook.com | (414) 614-8545

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Cumulative GPA: 3.76 | Dean's List: 5/7 Semesters

Milwaukee, WI

Anticipated: May 2024

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 - Analyze securities over multiple asset classes

PROFESSIONAL EXPERIENCE

Northwestern Mutual

Investment Data Analytics and Research Intern

Milwaukee, WI

Jun 2023 – Present

- Conduct research on overall investment holdings data to understand positioning of the general portfolio
- Build insightful Power BI reports utilizing an understanding of financial concepts and data analytics
- Provide concise investment holdings information to senior leadership for decision-making purposes
- Compile and create visuals used by senior leadership in presentations to credit rating agencies

Riverwater Partners

Equity Research Intern

Milwaukee, WI

Jan 2023 – Jun 2023

- Contributed to security selection for the Riverwater micro, small, mid, and large-cap equity strategies
- Screened for individual equities, prepared internal research reports, and presented findings to the research team
- Created proprietary financial models to assess multiples valuation, return on capital, and consistency of financials
- Attended private management meetings to gain insight from executives of small to medium-sized companies

Citgo Super Sales

Attendant

Grafton, WI

Jan 2020 – May 2023

- Provided exceptional customer service by conversing with both regular and infrequent customers
- Troubleshoot mechanical and other issues relating to POS, car wash, and fuel and propane dispensing systems

Selected Project Experience

- **ACG Cup Investment Banking Competition** *Spring 2023*
 - Performed research related to M&A alternatives, valuation, capital markets, and corporate strategy
 - Developed a presentation based on recommendations and presented to mock board of directors
- **Initiating Coverage Report: Snap-on Inc. (Ticker: SNA)** *Fall 2022*
 - Conducted industry research to identify the company's business and financial drivers
 - Performed comparable analysis, 3-stage DCF analysis, and multiples regression analysis

SKILLS & COURSEWORK

Skills: FactSet, Bloomberg (basic), ISS-EVA Investor Express, equity research, financial modeling, economic research, Power BI, DAX, Python, VBA, SQL, data modeling, Excel, PowerPoint, Word, Outlook, Spanish (intermediate)

Relevant Coursework: Intermediate Accounting, Intermediate Finance, Investment Finance, Macro to Financial Markets

EXTRACURRICULAR

Activities: FactSet Student Ambassador (2022 – 2023) and UWM Student Investment Club Member (2022 – Present), Sector Analyst (2021 – 2022)

Hobbies & Interests: Golf, sailing, cars, especially BMW, Porsche, and Tesla, 3d printing, amateur automotive repair, consumer electronics, cyber security, cryptocurrency, making espresso, finance and investing podcasts, and books on the topics of economics, investing, psychology, and philosophy

Andrew May

4480 North Oakland Ave, Apt.203, Shorewood, WI | akmay@uwm.edu | (815) 351-5289

EDUCATION

University of Wisconsin – Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Cumulative GPA: 3.64/4.00 | Business Scholars Program | Dean's List: 7/8 semesters

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

Milwaukee, WI

Graduated: May 2023

Adventis Financial Modeling Level I Training

Fall 2022

PROFESSIONAL EXPERIENCE

Black Maple Capital LLC

Reconciliation and General Intern

- Ensure cash between trading accounts balances daily and locate any discrepancies
- Confirm utilized models are working properly and work to improve efficiency
- Created a template to ensure held securities and their quantities match between different brokers
- Run end-of-day trade files to brokers and verify trade details are accurate

Milwaukee, WI

December 2022 – Present

University of Wisconsin – Milwaukee

Recreation Center Programs Manager

Recreation Center Attendant

- Utilize a budget of \$10,000 per academic year for hosting campus events for students
- Organize events for students and see them through from conceptualization to execution

Milwaukee, WI

May 2022 – May 2023

August 2021 – May 2022

Baker Tilly Valuation

Business Valuation Intern

- Entered financial data from companies and their related entities into Excel models
- Generate and ensure consistent formatting of valuation report drafts in preparation for delivery to clients

Milwaukee, WI

June 2022 – December 2022

McCarthy Grittinger Financial Group LLC

Tax Intern

- Performed income tax preparation for clients during the tax season
- Collaborated with the tax team and client advisors to verify that each return included all pertinent information and was completed accurately

Milwaukee, WI

February 2022 – April 2022

Selected Project Experience

- > **Initiating coverage report** for Plexus Corp. (Ticker: PLXS) *Fall 2022*
 - 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
- > **Business Valuation Reports** for Baker Tilly *Summer 2022*
 - Compiled financial data for various company's entities and entered them into a valuation model
 - Conferred with team members to ensure the model's accuracy and entered data into corresponding reports

TECHNICAL SKILLS

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

EXTRACURRICULAR

Student Investment Club

January 2021 – May 2021

- Industrials and Materials sector analyst

Atmospheric Science Club

December 2019 – May 2023

Hobbies

- Basketball (player, coach, referee)

Isaac Monday

Milwaukee, WI | immonday@uwm.edu | (920) 350-5232

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Milwaukee, WI

Graduation: May 2024

Cumulative GPA: 3.76 | Major GPA: 3.71 | Business Scholars Program | Honors College | Dean's List: All semesters

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on over \$10 mil in portfolios, and present performance, attribution, and strategies to investment boards
 - Analyze securities over multiple asset classes
- Financed 75% of tuition/living expenses through employment while a full-time student
- Milton Friedman's Capital Scholar in *Free to Choose*

PROFESSIONAL EXPERIENCE

Baker Tilly, US

Business Valuation Intern

Milwaukee, WI

Jan. 2023 – Current

- Spread client business financials into Excel model
- Perform DCF, fair value, and/or fair market value analysis
- Draft reports in Word to deliver to client

Carson's Famous

Carryout

Milwaukee, WI

Sep. 2022 – Jan. 2023

- Assemble and give takeout orders to guests

Northwestern Mutual – Lueder Financial Group

Financial Representative Intern

Milwaukee, WI

Jan. 2022 – Aug. 2022

- Set meetings with viable, high net worth prospects
- Obtained 11 solid clients; Licensed in 3 states (WI, NE, NJ)

Summit Credit Union

Mortgage Closer

Cottage Grove, WI

May 2021 – Aug. 2021

- Packaged documents for client signatures; Daily average 60 packages
- Constructed home-equity-line-of-credit applications; Daily average 8 applications
- Verified employment with members' employers; Daily average 50 calls/emails/faxes

Madison Mallards Baseball Club

Mascot (Maynard)

Madison, WI

May 2021 – Aug. 2021

- Hyped up crowd and players
- Took pictures with fans and families
- Participated in on-field activities and advertisements

Selected Project Experience

- **Eagle Scout Project** **Sept. 2020**
 - Led a team of scouts to develop a boat landing/launch on the Crawfish River
- **Initiating coverage report** for Alliant Energy Corp. (Ticker: LNT) **Fall 2022**
 - 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, and ISS-EVA Investor Express**
- **Microsoft Excel, Word, Access, and PowerPoint**
- **R Studio**

EXTRACURRICULAR

Boy Scouts of America

- Eagle Scout, Junior Assistant Scoutmaster, Order of the Arrow

Sept. 2009 – Oct. 2020

Hobbies

- Golf, coin collecting, video games
- Interested in investing since 2021 when I opened my own brokerage account

Lubar School of Business Dean's Scholarship (8 semesters); Baird Advisors in Honor of Gary Elfe (4 semesters)

Volunteer Mentor with Big Brothers Big Sisters Milwaukee

Fall 2021 – Winter 2022

Alexander Perez

Milwaukee, WI | alexperez5749@gmail.com | (262) 515-5749

EDUCATION

University of Wisconsin-Milwaukee

*Bachelor of Business Administration in Finance, Certificate in Investment Management
Bachelor of Arts in Economics*

Milwaukee, WI

Graduation: May 2024

Cumulative GPA: 3.65 | Lawton Scholars Program | Dean's List: 5/9 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 \$7 mil, and present performance, attribution, and strategies to investment boards
 - Analyze securities over multiple asset classes
- Finance 90% of tuition/living expenses through employment while a full-time student

Adventis Financial Modeling Level I Certification

Anticipated Completion: Sept. 2023

Indian Trail High School & Academy

Highschool Diploma with Honor Society Distinction

Kenosha, WI

Graduation: June 2019

PROFESSIONAL EXPERIENCE

Crabel Capital Management

Quantitative Research Intern

Milwaukee, WI

June 2023–Aug. 2023

- Developed intimate relationship with portfolio manager who was responsible for mean reversion product (~\$3.5 B)
- Used scientific approach when researching trading strategies before trying to quantify/manipulate real data
- Used prior knowledge/experience of global macro research to quickly and effectively develop real opportunities
- Refined and optimized real strategies with portfolio manager and other quants
- Modeled, quantified, and back tested automated strategies in a presentable and intuitive format
- Utilized FactSet security/macro data to develop novel strategies tailored to PM's investment philosophy
- Completed and presented 3 real projects using daily closing price data along with internally developed independent variables

Greenwoods State Bank

Data Analyst & Syndication Management

Waukesha, WI

Sept. 2022 – May 2023

- Assembled loan syndication and funding of notes using Fiserv platform
- Prepared +2,000 internal accounts in excel for data & regression analysis
- Uncover correlations with defaulted/troubled accounts and independent variables
- Filter and analyze internal loans to create portfolios for sale to external finance entities

Credit Intern

July 2022 – Sept. 2022

- Chaired to head web scraping for all past due accounts with balances ranging from \$80k to \$500k
- Refined research and due diligence to establish specific customer/business' financial situation
- Analyze loan approval/denial algorithm resulting in enrichment and improved efficiency when assessing credit risk
- Screening head loan underwriter leading to individual underwriting

EmOpti

Technical Analyst Intern

Brookfield, WI

Sept. 2021 – Jan. 2022

- Chaired to run and present cost/benefit analysis to clients that lead to an increase in company ARR by 50% yoy
- Explored and analyzed potential acquisition of analytics company that would increase valuation by +35%
- Boosted Series A funding round, working 1on1 with CEO on investor presentations and pitch deck

Siemens

Procurement Management Intern

Buffalo Grove, IL

June 2021 – Feb. 2022

- Selected for automation team to streamline requisition process while keeping within regulation of the National Defense Authorization Act, resulting in a 50% increase in procedural efficiency
- Orchestrated a successful pivot to new procedural workflow and served as a point of contact for 122 suppliers
- Leveraged database and analytical programs to project \$5 million of demand and pricing data for key products

Upcoming Selected Project Experience

- **Initiating coverage report** for ManpowerGroup Inc. (Ticker: MAN) *Fall 2022*
 - Will conduct industry and competitive research to identify the company's business and financial drivers
 - Will perform comparable company analysis, 3-stage DCF analysis, and multiples regression analysis
- **Independent 10-K Analysis** *Fall 2018*
 - Analyzed data from firms' financial reports to run linear regression models in efforts to maximize r-squared values
 - Pursued self-education fueling further learning outside of institutional classes resulting in advanced proficiency in business analytics, effective financial ratios, and Microsoft Excel

SKILLS

- **Fluent English/Spanish**
- **Bloomberg, FactSet, and ISS-EVA Investor Express**
- **Microsoft Office, Google Ecosystem**
- **Java(basic), R, Python (basic), thinkScript, web scraping**
- **Crypto currency mining (GPU)**
- **Sales**
- **Network enrichment**
- **Drop shipping (Shopify/Alibaba/Ali Express/Oberlo)**
- **Swing/Day trading (thinkorswim)**

EXTRACURRICULAR

Milton Friedman "Capitaf" Retreat; New England

Spring 2022

- 1 of 6 students selected to learn from Friedman's books, "Capitalism and Freedom", and "Free to Choose"
- Discussed and studied Friedman's economic theory with Economists
- Explored Dartmouth College intellectuals and the history of the higher education establishment

Student Investment Club

Feb. 2020 – Feb. 2022

Economist

- Contributed fundamental analysis and market research in coordination with 30+ peers to extract meaningful and quantitative information regarding domestic markets and individual firm equity performance
- Leveraged expertise in linear regression analysis to contribute tangible value to the team, and organization, resulting in higher yield financial strategies

Collegiate Entrepreneurs' Organization

Sept. 2020 – Present

Member

- CEO Global @Tampa, FL where insight was given by CEO's and executives of multi-billion-dollar businesses
- Probed events by established entrepreneurs to offer insight and guidance for peers' entrepreneurial ambitions
- Established network with international entrepreneurs and C-Suite executives for guidance, insight, etc.

Hobbies

- Soccer, golf, weightlifting, chess, fishing, sneakers
- Religious practice (Catholicism)
- Podcast: My First Million, The Tim Ferris Show
- Interested in investing since 2015 after I believed my parents were victimized via Microsoft stock
- Financial/Investment Consulting

Scholarships

- **Lawton Scholars (\$1,250/semester)**

Owen Phillips

3008 N Maryland Ave, Milwaukee, WI 53211 | 920-376-3182 | phill462@uwm.edu

EDUCATION

University of Wisconsin – Milwaukee

Bachelor of Business Administration

Major: Finance; Certificate in Investment Management

Cumulative GPA: 3.5/4.0

Skills: MS Office, Bloomberg (basic), FactSet, ISS EVA Investor Express, eVestment, Capital IQ

Milwaukee, WI

May 2024

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

Selected Member

Milwaukee, WI

May 2022 – Present

- Selected as 1/18 students for a rigorous, 21-month CFA Program focused on investment oversight and company analysis
- Actively manage over \$10 million portfolio, from bottom-up analysis of securities through portfolio and macro analysis
- Performed equity research report covering GNRC including financial drivers, industry competition, economic trends, and valuation

EXPERIENCE

Nfluence Partners

Investment Banking Summer Intern - Technology and Media

San Francisco, CA

Summer 2023

- Utilized Capital IQ data to create comparable company analyses for early-stage, high growth tech services and media platform clients
- Compiled initial drafts of relevant buyer lists spanning both potential strategic and financial acquirors to maximize value for clients
- Executed in-depth market research on niche subcategories of consumer tech and media industries for usage in marketing materials
- Assisted in management of sell-side advisory process through organization of contacts, cleaning of data, and document distribution
- Constructed preliminary versions of slides to be added into pitchbooks and CIMs that included model outputs and industry analysis

Alpha Investment Consulting Group

Investment Research Intern

Milwaukee, WI

Spring 2023

- Engaged in due diligence with fund managers across multiple asset classes to evaluate manager skill and risk-reward potential
- Built pitch books detailing new vs. current managers that aided Alpha's Investment Committee in fund allocation
- Participated in conference calls with fund managers to gain insight on quarterly performance and future outlook of fund allocation

CFA Institute Research Challenge - OSK

1st Place Regional Champion

Mid-West

February 2023 – April 2023

- Participated in global competition through bottom-up company and financial analysis including, ESG, valuation, and market drivers
- Researched, created, and presented stock pitch materials and reports to a board of judges and industry analyst on buy rating of OSK
- Reached out to municipalities to gain insight on the future spending and its effects on OSK specialty vehicles product line

BP Sophomore Experience Program

Selected Participant

Virtual

May 2022

- Accepted into a two-week long Trading & Shipping Bootcamp with concentration on Refining, Products Trading, Operations
- Participated in various T&S information sessions that included: Marketing & Origination, Analytics, Commercial, Trading
- Competed in a virtual trading simulation to gain an understanding of the power of futures contracts and trade position size

Outdoor Solutions

Laborer / Operator

Oshkosh, WI

May 2018 – August 2022

- Designed logos and contributed to marketing through social media which lead to a significant increase in local brand awareness
- Worked in a team and along with other subcontractors to install in and out of ground pools and other landscaping features
- Worked on commercial neighborhoods, earthwork, and landscaping job sites leveraging previous on-the-job experience
- Coordinated materials, equipment, and labor to meet the project's specific needs and maintain a target profit margin of 12%

LEADERSHIP ACTIVITIES

Investment Club

Member

Milwaukee, WI

January 2022 – Present

- Actively manage \$100,000, pitch stocks to the club and constructively evaluate others' ideas
- Discuss current market events (M&A, capital raises, and macroeconomic trends) in weekly meetings
- Listen / interact with industry speakers; read literature on valuation to improve skills as an analyst

Panther Real Estate Club

Member

Milwaukee, WI

January 2022 – Present

- Collaborate in analyzing real estate trends and current market topics with real listings
- Supplement classroom education to become more knowledgeable on single and multifamily properties

Elmbrook Humane Society

Member

Milwaukee, WI

March 2023 – Present

- Analyze performance and positioning of \$5 million in AUM, followed by presenting analyses to board members

Interests

Pickup basketball, tennis, golf, personal investing, *Texas Hold 'Em*, backcountry snowboarding, camping, social media arbitrage

Bryce Schneider

Milwaukee, WI | schne664@uwm.edu | (920) 204-2534

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Milwaukee, WI

Graduation: May 2024

Cumulative GPA: 3.63 | Dean's List: 4/6 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 performance, attribution, and strategies to investment boards
 - Analyze securities over multiple asset classes

Enrolled in Adventis Financial Modeling Level I Program

Sept. 2022

PROFESSIONAL EXPERIENCE

Wipfli

Business Valuations Intern

Milwaukee, WI

January 2023 - Present

- Utilize tax returns, financial statements and industry data to arrive at a valuation
- Work in a team setting to effectively learn and grow
- Communicate with different levels of management to finish projects

Service Oil Company

Gas Attendant

Oshkosh, WI

June 2018 – August 2020

- Engaged effectively with customers to ensure a good experience
- Balanced the worksheet at the end of every shift to account for all sales
- Learn valuable skills such as communication and time management

Selected Project Experience

- **Initiating coverage report** for Oshkosh Corp (Ticker: OSK) *Fall 2022*
 - 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
- **CFA Research Challenge** *November 2022 - Present*
 - Research report & presentation covering Oshkosh Corp (Ticker: OSK)
 - Conducted valuation methods, industry research, and competitive research to arrive at a recommendation
- **Elmbrook Humane Society** *February 2023 - Present*
 - Analyzed 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

Volunteering

- Usher at St. Jude's starting my freshman year of high school
- Volunteered in a school setting for a semester, helping manage a middle school gym class

Hobbies

- Golf, powerlifting, and filmmaking
- Interested in investing due to my dad's influence as a financial advisor

Justin Thimmesch

Milwaukee, WI | justinthimmesch@outlook.com | (920) 905-2048

EDUCATION

University of Wisconsin – Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Milwaukee, WI

Graduation: May 2024

Cumulative GPA: 4.00 | Dean's List: 5/5 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, present performance, attribution, and strategies to investment boards
 - Analyze securities over multiple asset classes
- Finance 75% of tuition/living expenses through employment while a full-time student

CAIA Level I Candidate

Mar. 2024

ACG Cup Investment Banking Competition

Apr. 2023

Adventis Financial Modeling Level I Certification

Jan. 2023

PROFESSIONAL EXPERIENCE

Cortes Capital, LLC (Love's Private Equity)

Investment Analyst Intern

Oklahoma City, OK

Jun. 2023 – Present

- Source and evaluate direct, fund, and co-investment opportunities for further evaluation by CIO
- Participate in management meetings and develop investment recommendation reports
- Analyze financial data and model expected future cash flows

Wipfli

Business Valuations Intern

Milwaukee, WI

Jan. 2023 – May 2023

- Populate financial models with data from company financial statements and tax returns
- Conduct industry and economic research in preparation of valuations
- Analyze financial data and create valuation reports and presentations

U.S. Bank

Custody Operations Specialist (Reconciliations)

Milwaukee, WI

Aug. 2022 – Jan. 2023

- Ensure accurate posting of debits and credits for wealth management transactions
- Produce financial accounting information for corporate treasury
- Shadow the mutual fund trading and dividend income teams

Selected Project Experience

- **Initiating coverage report for Schneider (Ticker: SADR)** *Fall 2022*
 - 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

- **FactSet, ISS-EVA Investor Express, Bloomberg (basic), S&P Capital IQ**
- **Python (basic); Microsoft Excel, Word, and PowerPoint**

EXTRACURRICULAR

- Student Investment Club (Treasurer, Secretary, and Equity Analyst) *Jan. 2021 – Present*
- Lubar 25, Corporate Ethics, and Victor Chou Scholarships *2022 – 2024*

Hobbies

- Hiking, Cooking, Volunteering, and the Green Bay Packers

Emily Zimmer

Milwaukee, WI | Emily2020Zimmer@Outlook.com | (262)-527-2208

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Milwaukee, WI

September 2020 – May 2024

Cumulative GPA: 3.7/4.0

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

PROFESSIONAL EXPERIENCE

Allspring Global Investments

Investment Risk Intern

Menomonee Falls, WI

November 2022 – Present

- Analyze risk factors contributing to global portfolio funds, counterparty related transactions, and trading activity
- Contribute to annual counterparty and broker dealer reviews, of which evaluate their current trade risk levels

Robert W. Baird

Financial Analyst Intern

Milwaukee, WI

January 2022 – November 2022

- Investigated financial advisor headcount and shareholder information based on YTD qualified production and AUM
- Revised and updated monthly and quarterly cash flow and income statement variances via Excel functions
- Assisted in monthly close processes including forecasting, budgeting, long-term planning, and compensation analysis

MLG Capital

Accounting Intern

Brookfield, WI

June 2021 – January 2022

- Reconciled real estate bank statements, booked accruals, reclassified entries, and completed monthly financial statements
- Reviewed and recorded forecasts, located and corrected errors in financial budgets and revised AR activity

Selected Project Experience

Initiating coverage report for Fiserv, Inc (Ticker: FISV)

Fall 2022 – Spring 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

CFA Institute Research Challenge – 1st Round Championship Team

Fall 2022 – Spring 2023

- Participated in a global competition involving financial and company analysis as well as equity research training

ACG Investment Banking Competition

Spring 2023

- Presented strategies involving M&A alternatives, valuation, capital markets, finance options, and corporate strategy

Elmbrook Humane Society

Spring 2023

- Analyzed performance and positioning and presented to a board for approximately \$5 mil in AUM

TECHNICAL SKILLS

- R Studio, Power BI, Microsoft Excel, Word, and PowerPoint, Data Reconciliation, and Accounting Adjustments
- Bloomberg, FactSet, ISS-EVA Investor Express, SQL, and Python

EXTRACURRICULAR

Student Investment Club

Financials Sector Analyst – Report biweekly on financial sector stock performance/analysis

Women In Business

Secretary – Create and structure membership fees

INTERESTS

- Running, Fishing, Golfing, Card Games, Traveling, Marvel Movies, Wakeboarding, Snowboarding, Comedy Shows