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Street | Dallas, TX 75201 | Phone | Email

PROFESSIONAL EXPERIENCE

REGIONAL WEALTH MANAGEMENT FIRM **Portland, OR**
Investment Analyst *April 2010 – February 2014*

- Initially hired in April 2010 as a retail financial advisor; given roles of increased responsibility culminating in final position as Investment Analyst
- Worked with firm CEO, CFO, and senior advisors to develop and present pitches for asset raising from current and prospective HNW/institutional clients
- Member of company's investment committee; influenced investment decisions across approximately $600 million (including both discretionary and non-discretionary assets), including a $400 million family office
- Developed asset/liability based financial plans for clients, including developing targeted rates of return to meet financial goals
- Conducted investment manager screening and due diligence using Morningstar Direct, fi360, and qualitative interviews
- Researched and recommended individual equity and fixed income securities
- Worked with firm CEO, COO, accountant, and senior advisors in a deal team to identify potential advisory practices to target for acquisition as part of the firm's strategic growth plan; worked with firm accountant to develop financial models for return on investment and time to breakeven on various acquisition scenarios
- Lead the process on a review of a Pacific Northwest university's private equity portfolio (approx. $75 million in commitments), including due diligence conference calls with GPs to assess viability and timetable on various exits (IPO, sale to strategic buyer, etc.) and estimated IRR on exits; developed presentation materials to report findings and recommendations for future private market strategies to the client
- Wrote/ghost wrote market commentary email newsletter/blog to clients and prospective clients

FAMILY-OWNED ADMIN FIRM FOR NON-PROFITS **Tigard, OR**
Accounting and Consulting Support *May – August 2008; May 2009 – April 2010*

- Conducted full-charge general ledger bookkeeping; assisted with reconciliations and preparing company financial statements
- Executed banking deposits, transfers, and distributions for both internal and client accounts
- Maintained and verified data quality of client records on various CRM systems

LOCAL CPA FIRM **Tigard, OR**
Accounting Intern *June 2007 – August 2007*

- Worked directly with clients to maintain and verify accounting records across multiple accounting systems
- Rebuilt and verified a client's corrupted accounting general ledger from original bank records and billing documents

OUTSIDE ACTIVITIES

- Chartered Financial Analyst Program Level III Candidate
- Currently enrolled in the Breaking Into Wall Street financial modeling course, utilizing Excel modeling with actual SEC filings
- Gave guest lectures at a corporate finance class at Marylhurst University on valuation principles (August 2012, February 2013, March 2013)

EDUCATION

University of North Carolina at Chapel Hill **Chapel Hill, NC**
Bachelor of Arts Major in Economics; Business Administration Minor *2006 - 2009*

- Coursework included financial accounting, managerial accounting, corporate finance, statistics, and strategic management
- Active member of Undergraduate Investment Club; researched and produced reports on individual equities and ETFs in club portfolio utilizing Bloomberg and FactSet
- Active member of Alpha Kappa Psi, Professional Business Fraternity; mentored younger members for personal and professional success; continued involvement after graduation through an "Alumni Buddy" mentorship program

University of Oregon **Eugene, OR**
Transferred to University of North Carolina at Chapel Hill *2005 – 2006*

LICENSES, SKILLS & INTERESTS

- Series 7, 63, 65
- Proficient with Excel, Bloomberg, Morningstar Direct, and fi360; experience with FactSet
- Enjoys snowboarding, hiking, and outdoor activities