

Dylan McFarlane

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(804) 510-9866

Education

James Madison University

B.B.A. Finance, Economics Minor

Awards: President's List, Dean's List

Harrisonburg, VA

Expected Graduation: May 2023

Cumulative GPA: 3.87/4.00

Experience

Madison Investment Fund

Portfolio Manager, Consumers Sector

Associate Manager, Consumers Sector

Junior Analyst, Consumers Sector

Harrisonburg, VA

April 2022-Present

April 2021-April 2022

November 2020-April 2021

- Serve as a portfolio manager for a student-led value-based equity fund that actively manages \$503,000 on behalf of the James Madison University Foundation's Endowment
- Manage \$70,000 within the Consumers sector diversified across 14 current investment holdings
- Lead weekly meetings with 4 analysts to discuss the sector's portfolio and identify market trends within the industry
- Pitched a buy presentation for Target Corp. and Keurig Dr. Pepper to expand the Consumers sector's portfolio
- Prepared and presented weekly market commentary to the fund as the leader of the Economic Analysis Group

Federal Reserve Bank of Richmond

National IT Intern

Richmond, VA

May 2022-August 2022

- Created customer facing website content using Confluence and SharePoint software to provide information on National IT products and simplify the customer onboarding process
- Submitted build requests to engineers for network servers in the cloud at the request of clients
- Developed and present an internship process improvement plan aimed at optimizing intern onboarding, communication, development, and project assignment
- Participated in Central Banking Knowledge Classes related to monetary policy and the U.S. payments system

KRE Global Advisors, Inc.

Intern

Centreville, VA

Seasonal, May 2021-August 2022

- Utilized Excel and other technology to collect and analyze client data and identify operational improvement areas in the client's scholarly publishing division to provide a cost-efficient solution
- Conducted industry research to establish benchmark information on competitors' cost structure that was used to create an operational cost model aimed at streamlining the editorial processes of the client
- Evaluated potential client acquisitions by running numerous scenarios through a 10-year financial model
- Collaborated with the President of KRE to help prepare presentations for client meetings

Extracurricular Activities

Financial Management Association

Member

Harrisonburg, VA

September 2020-December 2021

- Engaged in market talk presentations, professional development workshops, and stock market simulations
- Placed 1st out of 16 participants in the club-wide stock market simulation, earning a 7.84% return over 3 months

Beta Theta Pi Social Fraternity

Recruitment Committee

Harrisonburg, VA

April 2021-December 2021

- Planned and executed recruiting strategies and events to showcase the fraternity's strengths
- Introduced, shared important information, and influenced potential new members during the recruitment process

Skills and Interests

Skills/Certifications: Wall Street Prep Course, Bloomberg Market Concepts Certification, MOS Certification

Activities/Interests: JMU Honors College Open House Volunteer, Basketball, Golf, Piano (Self-taught)

Honors: Beta Gamma Sigma International Business Honor Society, Pi Kappa Phi Honor Society