

Permanent Address:
5912 Bottomley Place
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Current Address:
JMU Box #1170
Harrisonburg, VA 22807

EDUCATION

James Madison University

Bachelor of Business Administration; Finance Major and Computer Information Systems Minor

Harrisonburg, VA

Expected Graduation: May 2025

GPA: 3.59

Major Specific GPA: 4.00

RELEVANT EXPERIENCE

Madison Investment Fund

Associate Manager – Technology Sector

Harrisonburg, VA

April 2022 – Present

- Perform financial analysis in a student-led value investment fund responsible for upholding fiduciary duties on behalf of the JMU Foundation by managing a diverse equity portfolio of over \$500,000, covering 6 economic market sectors
- Support portfolio manager and lead 2 supporting analysts on due diligence of potential investments, weekly updates on macroeconomic environment, and present to the executive committee sector performance
- Complete ad-hoc activities including new member education, selecting fund pitches, and critical voting privileges

Senior Analyst – Financial Sector

Nov. 2021 – Apr. 2022

- Incorporated both quantitative and fundamental financial analysis to create and present pitches on NASDAQ: ABB and NYSE: MA, affirming two long equity investments totaling \$9,000, appreciating roughly 5% since capital investment
- Developed weekly reports on multiple holdings within the Financials sector, specifically focusing on the relative valuation of holding companies and assessing potential regulatory impacts on the industry
- Implemented fund Transparency Initiative Program as intern, mapping portfolio sector returns to S&P 500 using Power BI and Yahoo Finance API, automating sector performance analysis for stakeholders – improving report efficiencies
- Present current event market research to 40 fund members, leading conversations on status of economic environment

Chesapeake Bank

Data Analytics Intern

Williamsburg, VA

April 2022 – August 2022

- Analyzed consumer and business accounts in Tableau to group the top ten accounts based on tax id and account balance.
- Cleaned and processed pdf data employing the dplyr library
- Utilized R, SQL and Shiny to query the loan database and developed a shiny dashboard to convey a model that computes the ROE and net income of an individual loan

Bottomley Group

Assistant Manager

Glen Allen, VA

October 2019 – August 2021

- Researched real estate bid-ask spreads, housing attributes, and market timing to assess valuations on property sell price
- Assessed firm risk tolerance to choose undervalued opportunity investments and pitch to firm management
- Sale highlight: generated \$100,000 profit for firm on finding property then leading a team of four through home renovations, cutting an additional \$10,000 in expenses by taking manual labor initiative

ADDITIONAL ACTIVITIES

James Madison Club Wrestling Team

Treasurer

Harrisonburg, VA

September 2021 - Present

- Personally secured anchor investors, generating \$12,000 in funding to host JMU-sponsored wrestling competitions
- Led the development of a new wrestling tournament for JMU, generating \$3,500 profit by charging opponents and managed tournament co-coded (with President) software to track tournament statistics and funding expenditures

Madison Business Review

Business Staff Writer

Harrisonburg, VA

February 2022 - Present

- Research overarching market conditions, current events, and business news for a publication service intended for the JMU student body and Harrisonburg communities, averaging 400+ weekly readers per solo-written article
- Author articles depicting the protection of investments from inflation, relative valuations, and business trends

SKILLS, AWARDS, & CERTIFICATIONS

Skills/Certifications: HTML, R, SQL, Tableau, Excel, Bloomberg

Awards: 2021 PWC Challenge Champion, 2022 NWCA Qualifier, 2022 2nd 2022 Good Wealth Management Challenge

Interests: Wrestling, Football (Dallas Cowboys), Soccer, Golf, Snowboarding, Traveling, and Grilling