

Permanent Address:
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Temporary Address:
1900 Sunchase Drive
Harrisonburg VA, 22801

EDUCATION & CERTIFICATIONS

James Madison University

B.B.A. in Finance with an expected concentration in Financial Analysis

Harrisonburg, VA

Expected May 2024

Cumulative GPA: 3.78

CFA Institute

Certificate of Investment Performance Measurement (CIPM), Level II Candidacy

Charlottesville, VA

March 2022

Performance Measurement

Performance Attribution

Performance Appraisal

Manager Selection

Ethics

Performance Presentation (GIPS)

Bloomberg Market Concepts

May 2020

Wall Street Prep

November 2020

RELEVANT EXPERIENCE

The Madison Investment Fund

Associate Manager

Senior Analyst

Intern

Harrisonburg, VA

May 2021 - Current

November 2020 – May 2021

September 2020 – November 2020

- Serve as an analyst in the technology sector in a student-led investment fund responsible for managing an equity portfolio of over \$500,000 on behalf of the James Madison University Foundation
- Educate the new class interns in general topics of financial markets and investments as an associate manager
- Lead and participate in weekly discussions with a group of four analysts to discuss existing market trends in the technology sector with a focus on the application to future investments
- Lead a group of three other interns and incorporated both fundamental and financial analysis to develop and present a buy recommendation for Johnson & Johnson

RELEVANT COURSEWORK

James Madison University

Management Science

Calculus/Statistics

Computer Information Systems

Financial/Managerial Accounting

Microeconomics

Macroeconomics

Harrisonburg, VA

WORK EXPERIENCE

Atlantic Coast Athletic Club

Swim Coach, Lesson Instructor, and Lifeguard

Midlothian, VA

May 2015 - August 2020

- Coordinated practices for over 90 swimmers with a focus on lap time improvement

ACHIEVEMENTS

Boy Scouts of America

Eagle Scout

Midlothian, VA

Received March 2019

- Scouting's highest honor; received by those with exceptional community service and leadership
- Planned, developed, and provided leadership for over twenty-five volunteers for Eagle Project

SKILLS, ACTIVITIES, & INTERESTS

Skills: Microsoft Office (Word, Excel, PowerPoint), Financial Analysis, Teamwork, Communication

Activities: Blue Ridge Area Food Bank & Richmond Caritas Volunteer, Financial Management Association

Interests: Volunteering, Backpacking, Mountain Biking, Volleyball, and Disc Golf

