

Investment Management Certificate Program (IMCP)

University of Wisconsin-Milwaukee

Lubar School of Business

www.lubar.uwm.edu/IMCP

Class of 2019 Resume Packet:

Rachel Baetke

Karsen Bell

Todd Blatnik

Dace Bregantini

Rogelio Cuevas

Carter Kauth

Connor Kempson

Matthew Klaver

Samuel Martinez

Jacob Meehan

Brett Michaels

Nicholas Thillman

Derek Urben

Gus Vanevenhoven

Travis Wiedmeyer

Contact Information:

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RACHEL BAETKE

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EDUCATION:

University of Wisconsin – Milwaukee

Bachelor of Business Administration

Anticipated Graduation: May 2019

Major: Finance

Cumulative GPA: 3.802/4.000

Dean's Honor List: 2014, 2015, 2016, 2017, 2018

Investment Management Certificate Program (21-Months) (lubar.uwm.edu/IMCP)

- Participate in a CFA University Affiliated Program
- Analyze individual securities over multiple asset classes
- Monitor and rebalance portfolios of real money
- Report performance and attribution to both internal and external investment boards for over \$7M of cumulative AUM

Financed 100% of tuition/living expenses through employment/loans while a full-time student

PROFESSIONAL EXPERIENCE:

Gentian Financial, Inc.

Milwaukee, WI

Private Wealth Management Intern

December 2017-Present

- Migrate data from one software to another
- Update and create financial plans for clients
- Perform daily duties, such as: answering phones, making appointments, and processing checks

New Land Enterprises, LLP

Milwaukee, WI

Leasing Agent/Resident Manager

April 2015–Present

- Completed landlord certification
- Maintain a clean and respectful property in accordance to policy and procedures
- Complete regular rental inspections

BMO Harris Bank

Milwaukee, WI

Service Representative

January 2017–September 2017

- Processed large currency transactions
- Followed government regulations and bank policies, directives, and procedures
- Provided customer service to build relationships and best assess financial needs

Shoreline Credit Union

Manitowoc, WI

Teller

April 2013–January 2015

- Completed financial legal documents in order to maintain member accounts
- Organized and handled confidential documents
- Processed a variety of financial transactions while complying with all government regulations and bank policies, directives, and procedures

TECHNICAL SKILLS:

- Bloomberg, EVA Express, and FactSet
- Microsoft Excel, Word, PowerPoint, Outlook, Access, and VBA programming
- Adobe Photoshop Elements, Lightroom
- Windows, Mac OSX, Linux

OTHER ACTIVITIES:

- UWM Center for Community-Based Learning, Leadership, & Research **October 2014–Present**
- Hobbies: Photography, cooking, music, reading, Pilates, basketball, volleyball

KARSEN BELL

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EDUCATION:

University of Wisconsin – Milwaukee

Bachelor of Business Administration

Anticipated Graduation: May 2019

Major: Finance

Cumulative GPA: 3.31/4.00

Dean's Honor List: 2014, 2015

Investment Management Certificate Program (21-Months) (lubar.uwm.edu/IMCP)

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- Monitor and rebalance portfolios of real money
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PROFESSIONAL EXPERIENCE:

Prudential Financial

Wauwatosa, WI

Marketing Assistant Intern

Mar. 2017–Present

- Work closely with a team of advisors to help assist in management services
- Generate a variety of different reports based on selected client criteria
- Assist in the issuance of wealth, ownership, and beneficiary transfers

Rent College Pads (Venture Capital Fund)

Milwaukee, WI

Operations Intern

Sept. 2016–Mar. 2017

- Routinely entered data, invoices, and contractual agreements for managerial review and to ensure customer satisfaction
- Was responsible for back-end data entries using analytical tools to better assess demographics, consumer trends, and available properties for prospective renters
- Worked directly with partners and associates to develop improvements for company website and implement periodic updates
- Trained employees on the firm's operations, focusing on back-end site development

Culvers

Elm Grove, WI

New Employee Trainer

Jul. 2012–Aug. 2014

- Trained incoming employees on all restaurant positions
- Provided efficiency in a high stress and fast-paced environment
- Commitment of Excellence Award – 2014: Recognized in providing outstanding customer service

TECHNICAL SKILLS:

- Bloomberg, EVA Express, and FactSet
- Microsoft Excel, Word, PowerPoint, Access
- Proficiency in French (oral and written)
- Wealthscape, ClientLink, & Lotus Notes

OTHER ACTIVITIES:

- **2016 – Present:** Student Investment Club–Consumer Discretionary Analyst
 - Provide analyst updates, pitched Tesla Motors, and monitored existing positions
- **2016 – Present:** Alpha Kappa Psi Professional Business Fraternity– Co-Chairman of Professional Development Committee
 - Work with a team to find sponsorship opportunities and arrange workshops for members
 - Extensive volunteer service and leadership development
- Hobbies: Saltwater fishing, Painting (acrylic, oil, and watercolor), & Traveling

TODD BLATNIK JR.

3053 N Frederick Ave • Milwaukee WI 53211 • (262) 751-4592 • tblatnik@uwm.edu

EDUCATION:

University of Wisconsin – Milwaukee

Masters in Financial Analysis

Expected Graduation: May 2019

Cumulative GPA: 3.9/4.0

Investment Management Certificate Program (21-Months) (lubar.uwm.edu/IMCP, a CFA University Affiliated Program)

- Analyze individual securities over multiple asset classes
- Monitor and rebalance portfolios for over \$7 mil of cumulative AUM
- Present performance and attribution to both internal and external investment boards

CFA Level I Candidate

University of Wisconsin – Milwaukee

Bachelor of Business Administration

Graduated May 2017

Majors: Finance and Accounting

Cumulative GPA: 3.4/4.0

Deans Honor List: 2016, 2017

United States Military Academy Preparatory School

Graduated May 2013

Recruited to play Division I Football for Army

General Academy Courses in preparation for West Point

Cumulative GPA: 3.4/4.0

PROFESSIONAL EXPERIENCE:

Gardner Denver Inc.

Milwaukee, WI

Treasury Analyst Intern

June 2017–Present

- Innovate processes of improvement and centralization within treasury
- Created and provided executive management a tactful tool to help manage the global company
- Forecast and manage cash flows, analyze FX exposures, strategize FX hedging and implementation
- Create systems of visual analytics for upper management

Northwestern Mutual

Milwaukee, WI

Investment Accounting Intern – Controllers Department

August 2016–April 2017

- Securities and derivatives accounting
- Assisted with month-end and quarter-end closing responsibilities
- Reconciled investment reports

Johnson Controls Inc.

Milwaukee, WI

Billing Representative Intern – Building Efficiency Division

June 2015–August 2015

- Processed invoices, validated credit, and rebilled clients
- Executed on other related assignments and projects

College Works Painting

Hartland, WI

Branch Manager & Production Manager

February 2014–August 2014

- Started a branch, ran operations, and produced over \$55,000 through College Works Painting
- Managed employees and made business with clientele

TECHNICAL SKILLS:

- Bloomberg, EVA Express, FactSet Excel Coding, Tableau, and GRETL
- Microsoft Excel, Word, PowerPoint, Visio, PFI/PAM, Calypso, JDE, NxGen, Outlook, and Access

OTHER ACTIVITIES:

- Student Investment Club **September 2015–Present**
- Delta Sigma Pi – Business Professional Fraternity
 - Chancellor & Prior Vice President of Social Events **January 2014–May 2017**
- Beta Alpha Psi – Professional Accounting Fraternity **January 2014–December 2016**
- Hobbies: Outdoor activities, boating, fishing, hunting, skiing, running, outdoor photography

DACE BREGANTINI

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EDUCATION:

University of Wisconsin – Milwaukee

Bachelor of Business Administration

Anticipated Graduation: May 2019

Major: Finance & Accounting

Cumulative GPA: 3.7/4.0

Dean's Honor List: 2016, 2017, 2018

Investment Management Certificate Program

- Participant in a 21-month CFA University Affiliated Program (lubar.uwm.edu/IMCP)
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University of Wisconsin – Washington County

Major: General Studies AAS

2010–2012

EXPERIENCE:

Duff & Phelps Competition

Fall 2017

- Worked with a team to derive fair value of media (print and digital) firm through three perspectives: DCF, comparable company analysis, and precedent transaction approach
- Constructed and presented a thorough analysis regarding the firm's strategic position in the industry and its financial position
- Contrasted strategy and benefits between strategic and financial buyers

PeepTrade Competition

Spring 2018

- Outperformed benchmark (S&P500) on a risk adjusted basis over a two-month period with own strategy
- Tracked multiple risk and return metrics such as: Sharpe ratio, information ratio, alpha, VAR, and tracking error for our portfolio over the duration of the competition

TECHNICAL SKILLS:

- Bloomberg and FactSet
- Microsoft Excel, Word, PowerPoint, Access, and VBA programming

OTHER ACTIVITIES:

- Student Investment Club **May 2016–Present**
 - Participated in buy/sell research and decision making
- University of Wisconsin–Milwaukee **Spring 2017**
 - Member of Phi Kappa Phi, an international honor society

RECENT BOOKS READ:

- “The Most Important Things Illuminated” - Howard Marks
- “The Art of Learning” - Josh Waitzkin

ROGELIO CUEVAS

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EDUCATION:

University of Wisconsin - Milwaukee

Bachelor of Business Administration

Anticipated Graduation: May 2019

Major: Finance

Minor: Economics

Dean's Honor List: Fall 2016, Spring 2017, Fall 2017

Investment Management Certificate Program (21-Months) (lubar.uwm.edu/IMCP)

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Financed 100% of tuition/living expenses through employment while full-time student.

PROFESSIONAL EXPERIENCE:

Robert W. Baird

Milwaukee, WI

Private Wealth Management Intern

2016–Present

- Assist Financial Advisor with portfolio construction using Thomson Reuters
- Update cost basis for clients
- Open Investment accounts for clients
- Process PIPS, Indication of Interest, and Syndicate allocations in BETA
- Prepare luncheon/breakfast events with other vendors for PWM
- Issue client checks, and balance daily deposits for Milwaukee PWM
- Maintain branch records per Compliance regulations

U.S Bank

Milwaukee, WI

Bank Teller

April 2015–April 2016

- Analyzed customers' financial profiles and referred customers to appropriate financial services and products as required
- Provided customers assistance with balance detail and other inquiries
- Processed customer cash, check, transfers, and transactions with a reconciled drawer
- Processed loan payments accurately, and verified proper ID information

Home Depot

Bay View, WI

Sales Associate

May 2014–April 2015

- Assisted department manager in ordering products when the count was low with the inventory of the inside garden department and tracked shrink status/losses
- Shared ideas with department manager to market low selling products (Velocity E)
- Developed teamwork to improve efficiency, and communicated with associates to increase company sales

TECHNICAL SKILLS:

- Bloomberg and FactSet
- Microsoft Excel, Word, and PowerPoint

OTHER ACTIVITIES

Student Investment Club–Vice-President, Energy Sector Analyst

November 2015–Present

- Develop weekly meetings with club members of 30 people
- Interview candidates for analyst roles
- Host monthly meetings with other members of the board
- Develop buy and sell pitches of a \$60,000 portfolio into the Energy Sector
- Present weekly updates to the Energy Sector to a club of 30 people

CARTER KAUTH

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EDUCATION:

University of Wisconsin – Milwaukee

Bachelor of Business Administration

Major: Finance

Minor: Economics

Cumulative GPA: 3.963/4.000

Dean's Honor List: 2015, 2016, 2017

Anticipated Graduation: May 2019

Investment Management Certificate Program (21-Months) (lubar.uwm.edu/IMCP)

- CFA University Affiliated Program
- Analyze individual securities over multiple asset classes
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Business Scholars Program: One of 35 high-achieving business students selected for rigorous seminar-style courses throughout undergraduate career

Member of Beta Gamma Sigma: highest scholastic achievement a student can receive at an AACSB accredited business school

PROFESSIONAL EXPERIENCE:

JP Morgan Private Bank

Incoming Summer Wealth Analyst

**Milwaukee, WI
Starting May 2018**

Lubar School of Business Dean's Office

Lead Student Worker

**Milwaukee, WI
September 2016-January 2018**

- Evaluated teaching assistants and business courses as part of a team
- Balanced and prioritized a variety of projects administered by the Dean's office
- Aligned and communicated with staff members to complete various projects
- Managed scheduling and delegated responsibilities for team of four student workers

Applebee's #216

Certified Neighborhood Expert

**Stevens Point, WI
February 2014-August 2016**

- Worked as a part of team to ensure customer satisfaction
- Responsible for the training of new hosts and servers
- Received consistent positive customer service reviews

TECHNICAL SKILLS:

- Bloomberg and FactSet
- Microsoft Excel, Word, PowerPoint, and Access

OTHER ACTIVITIES:

- Student Investment Club–Member
- Alpha Kappa Psi – Chapter Treasurer
- United Way Make a Difference Day – Volunteer
- Future Business Leaders of America – former chapter president and state champion

CONNOR EDWARD KEMPSON

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EDUCATION:

University of Wisconsin – Milwaukee

Bachelor of Business Administration

Anticipated Graduation: May 2019

Majors: Finance

Cumulative GPA: 3.53/4.00

Dean's Honor List: 2015,2016

Investment Management Certificate Program (21-Months) (lubar.uwm.edu/IMCP)

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Business Scholars Program: One of 35 high-achieving business students selected for rigorous seminar-style courses throughout undergraduate career

PROFESSIONAL EXPERIENCE:

Grunau

Milwaukee, WI

Accounting Intern

May 2017-Present

- Cost efficiency analytics
- Update YTD financial statements and bank reconciliations
- Design new methods of price checking and rebating

Merrill Lynch, A Bank of American Corporation

Milwaukee, WI

Global Wealth Management Intern

August 2016-November 2016

- Organized financial responsibility events
- Updated and assisted implementation of a goals based wealth management system
- Provided relevant mutual fund spreadsheets to advisors

Stein's Garden and Home

Milwaukee, WI

Assistant Lot Manager

June 2016-August 2016

- Organized outdoor sales lot and surrounding landscapes
- Coordinated with store leaders on sales and customer preferences
- Assisted store management with timely project completion

Sendik's Food Market

Milwaukee, WI

Dairy/Frozen Associate

May 2014-January 2016

- Maintained an organized department
- Communicated with store leadership on sales goals
- Assisted customers with questions and complaints

TECHNICAL SKILLS:

- Bloomberg and FactSet
- Microsoft Excel, Word, PowerPoint
- Beginner in JD Edwards

OTHER ACTIVITIES:

University of Wisconsin–Milwaukee:

- Member of Alpha Kappa Psi-A professional business fraternity
- Student Investment Club – Senior Sector Analyst (Energy/Utilities)

December 2016-Present

September 2017-Present

Hobbies: Hiking and world travel

MATTHEW KLAVER

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EDUCATION:

University of Wisconsin – Milwaukee

Bachelor of Business Administration

Anticipated Graduation: May 2019

Major: Finance & Accounting

Finance/Accounting

Cumulative GPA: 3.29/4.00

Dean's Honor List: 2016, 2017

Investment Management Certificate Program

- Participate in a 21-month CFA University Affiliated Program (lubar.uwm.edu/IMCP)
- Aid in monitoring and rebalancing real portfolios with over \$7.0M of cumulative AUM
- Analyze securities and asset classes in accordance with IPS
- Present performance attribution to internal and external investment boards

PROFESSIONAL EXPERIENCE:

Buffalo Wild Wings

Germantown, WI

October 2014–Present

Waiter

- Work in a fast-paced work environment and satisfy customer needs while managing multiple tables
- Accommodate customer needs as they arise and maintain excellent customer service scores
- Communicate the brand message and manage client relationships to produce customer loyalty

Sendik's Food Market

Germantown, WI

September 2012–July 2013

Cashier/Bagger

- Engaged with customers to help solve any problems or misunderstandings in a timely manner
- Learned product codes and best practices to quickly become an incredibly efficient team member
- Displayed patience while dealing with difficult issues and had excellent customer service reviews

GT Engineering

Germantown, WI

June 2011–May 2012

Maintenance

- Helped operate wire electrical discharge machining to create parts for manufacturing equipment
- Developed basic engineering competency to choose parts needed to repair and clean machines
- Managed inventory levels in order to maximize effectiveness from our budget and lead to success

OTHER ACTIVITIES

Beta Alpha Psi

Milwaukee, WI

January 2017–Present

Candidate

- Learn about local employment opportunities in the accounting field through weekly business meetings
- Actively speak and participate in events with local accounting firms
- Volunteer weekly hours in the accounting room to help tutor introduction and intermediate students

Milwaukee Volleyball Club

Milwaukee, WI

September 2016–Present

Active Member/Officer

- Participate regularly in weekly practices, as well as maintain a healthy routine
- Organize long distance travel for all members of the team
- Involved with the financial management of the club through regular meetings pertaining to the budget

Student Investment Club

Milwaukee, WI

September 2015–Present

Active Member

- Research and discuss current financial trends and individual stocks at weekly group discussions
- Attend speaker events to learn more about the investment management field
- Optimize our student portfolio through effective choices based on thorough equity research

SAMUEL MARTINEZ

3000 N Murray Ave • Milwaukee WI 53211 • (920) 629-5017 • marti662@uwm.edu

EDUCATION:

University of Wisconsin – Milwaukee

Bachelor of Business Administration

Anticipated Graduation: May 2019

Major: Finance, Investment Management Certificate

Cumulative GPA: 3.65/4.0

Dean's Honor List: All except Spring 2017

Investment Management Certificate Program (21-Months) (lubar.uwm.edu/IMCP)

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Business Scholars Program: One of 35 high-achieving business students selected for rigorous seminar-style courses throughout undergraduate career

PROFESSIONAL EXPERIENCE:

Baird

Incoming Institutional Equity Sales & Trading Intern

**Milwaukee, WI
August 2018-Present**

J. P. Morgan

Incoming Private Banking Summer Analyst

**Milwaukee, WI
May 2018-Present**

EY

Launch Intern

**Milwaukee, WI
June 2017–July 2017**

- Rotated through Financial Services Office (FSO) and RCP Assurance
- Completed 16+ hours of private equity/banking/wealth & asset mgmt. learning modules

Principal Financial Group

Annuity & Client Services Intern

**Des Moines, IA
June 2016–August 2016**

- Earned Most Outstanding Participant (1st/40 interns)
- Presented digital customer experience (CX) strategy final project to CEO, EVP, and SVP

TECHNICAL SKILLS:

- Bloomberg (certified), FactSet, EVA Express, Excel, and Word

ACTIVITIES & AWARDS:

- Student Investment Club – Industrials Analyst, Recruiter **January 2017–Present**
 - Raised membership ~25% through numerous class speeches
- American Marketing Association – Vice President **January 2016–December 2016**
- Collegiate Entrepreneurs' Organization – Member **September 2015–Present**
- St. Marcus Lutheran School – Math Tutor **January 2018–Present**
- Golden Key International Honor Society (top 15% of class)
- Kohl's Case Competition (2nd/20+ universities - \$400)
- CEO Elevator Pitch Competition (3rd/20 pitches - \$200)
- UWM Public Speaking Showcase Qualifier (top 20/400 speeches)
- UWM Business Writing Challenge Qualifier
- Robert W. Baird Mentoring Circles Program (1/12 selected students)
- Alois Bulawa Scholarship (\$10,500)
- Carlson School of Management Transfer Scholarship (\$2,500)
- Interests: Soccer, strength training, reading, and German automotive

JACOB MEEHAN

2531 N. Farwell Ave. • Milwaukee WI 53211 • (414) 336-9462 • jmeehan@uwm.edu

EDUCATION:

University of Wisconsin – Milwaukee

Master of Science in Management- Financial Analysis

September 2017 - May 2019

Major: Financial Analysis

Cumulative GPA: 4.00/4.00

Investment Management Certificate Program (21-Months) (lubar.uwm.edu/IMCP)

- CFA University Affiliated Program
- Analyze individual securities over multiple asset classes
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University of Wisconsin – Whitewater

Bachelors of Business Administration

September 2013 - May 2016

Major: Finance

Major GPA: 3.77/4.00

Cumulative GPA 3.51/4.00

Dean's Honor List: 2014,2015,2016

PROFESSIONAL EXPERIENCE:

Drexel Hamilton, LLC

Milwaukee, WI

Investment Banking Analyst - Intern

September 2017- Present

- Prepare presentation materials for use in client meetings, covering topics such as strategic alternatives, capital markets activity and general corporate finance
- Build detailed financial models to evaluate performance under various operating scenarios and to analyze the impacts of different capital structures and potential M&A transactions
- Participate in all stages of transaction executions and assisted with various projects

US Bank

Milwaukee, WI

Securities Specialist, Trust Technologies and Securities Services

June 2016 - August 2017

- Accounted for identifying, researching, and resolving asset and cash exceptions
- Helped model Excel spreadsheets to make standard work processes more efficient and less likely to breach service level agreements
- Aided in operational support and processing for various types of securities for corporate trusts, mutual fund custody, and institutional trusts

TECHNICAL SKILLS:

- Bloomberg, FactSet, Morningstar, and S&P Capital IQ
- Microsoft Excel, Word, and PowerPoint

OTHER ACTIVITIES:

- University of Wisconsin-Milwaukee:
 - Student Investment Club - Financials Sector Analyst **September 2017 – Present**
 - Peep Trade Competition **February 2018 - May 2018**
 - ACG Cup **April 2018**
- University of Wisconsin–Whitewater: **September 2013 - May 2016**
 - Ultimate Frisbee Club - Treasurer
 - Fishing Club

BRETT MICHAELS

2973 N. Farwell Ave • Milwaukee WI 53211 • (414)-248-0776 • michae62@uwm.edu

EDUCATION:

University of Wisconsin-Milwaukee
Bachelors of Business Administration

Expected Graduation: May 2019

Major: Finance & Accounting

Cumulative GPA: 3.864/4.000

Dean's Honor List: 2015, 2016, 2017

Investment Management Certificate Program (21-Months) (lubar.uwm.edu/IMCP)

- A CFA University Affiliated Program
- Aid in monitoring and rebalancing real portfolios with over \$7.0M of cumulative AUM
- Analyze securities and asset classes
- Present performance attribution to internal and external investment boards

PROFESSIONAL EXPERIENCE:

Rexnord Corporation

Milwaukee, WI

Finance Intern-Process and Motion Controls FP&A

September 2017 – February 2018

- Responsible for assisting the Financial Planning and Analysis team with projects such as tracking sales and orders by region, tracking internal capital expenditures for each business unit, and making end of the month journal entries
- Involved in new rebate initiative and responsible for the analysis of rebates that are currently paid out by Rexnord
- Communicated with individuals throughout the company to collect data that goes into sales, orders, and expenditure reports

Rexnord Corporation

Milwaukee, WI

Marketing Intern-Energy Sector

Summer 2016 and Summer 2017

- Responsible for conducting Product Life Cycle Management (PLCM) research for the Energy Strategic Marketing Group
- Focused on precision and consistency when conducting research and aimed to provide key market information to the energy team
- Compiled findings into several documents and presented to higher level management

UWM University Relations

Milwaukee, WI

Administrative Assistant

September 2016-May 2016

- Accountable for keeping office supplies and rooms organized in addition to ordering supplies when needed
- Conducted and completed projects with co-workers on various assignments

TECHNICAL SKILLS:

- Bloomberg and FactSet
- Skillful in MS Office Suite, Excel, Word, PowerPoint, Outlook, OneNote, etc.

OTHER ACTIVITIES AND ACCOMPLISHMENTS

- Business Scholars Program – Member
- Alpha Kappa Psi Professional Business Fraternity – Member
- Student Investment Club – Member
- Received a Lubar School of Business Dean's Scholarship (Fall 2015)

NICHOLAS P. THILLMAN

1660 N Marshall St #2 • Milwaukee, WI 53202 • (920) 227-7422 • npt@uwm.edu

EDUCATION:

University of Wisconsin – Milwaukee

Master of Science Financial Analysis

Investment Management Certificate Program (21-Months) (lubar.uwm.edu/IMCP)

- A CFA University Affiliated Program
- Analyze individual securities over multiple asset classes
- Monitor and rebalance portfolios of real money
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Anticipated Graduation: May 2019

GPA: 4.00/4.00

Ripon College

Major – Economics, Business Management

Honor Societies: Laurel Society, Omicron Delta Epsilon member

Honors: Cum Laude, Department Honors in Economics & Business Management

Bachelor of Arts May 2017

GPA: 3.65/4.00

University of St. Andrews

Accounting Lab Assistant

Spring Semester 2016

August 2015 – May 2017

PROFESSIONAL EXPERIENCE:

Northwestern Mutual

Distribution Finance Intern

- Prepare credit ratings for network offices, strategize metric improvements with managing directors
- Analyze financial statements, prepare budgeting and projection materials for network offices
- Report monthly financial statements for network offices, analyze financial projections to actual results

Milwaukee, WI

October 2017- Present

UMB Fund Services Operations

Operations Intern

- Assisted in processing transactions and maintenance of shareholder accounts while adhering to deadlines and 100% accuracy
- Recorded and responded to investors involving inquiries, complaints, and incomplete or inaccurate transaction requests

Milwaukee, WI

May 2017-August 2017

Creative Enterprise Consultants

Consultant

- Surveyed, developed, and published a study for Wisconsin Economic Development Corporation on the effects that store hour changes have on sales and first-time customers
- Directed market research for the Ripon Main Street for future downtown businesses
- Completed business planning, feasibility studies, marketing plans, financials, and budgets

Ripon, WI

February 2015 – May 2017

Wisconsin Public Service

Account Management Intern

- Analyzed rate comparisons for numerous Fortune 500 account-managed customers
- Gathered and reported data on the success of We Care and Focus on Energy
- Compiled survey data from Account Managed customers on the service of account executives to ensure customers were getting the best service possible
- Researched and compared utility prices in other markets to the competition

Green Bay, WI

May 2016 - August 2016

TECHNICAL SKILLS:

- Bloomberg and FactSet
- Microsoft Excel, Word, PowerPoint, SQL programming

EXTRACURRICULARS:

Ripon College Men's Soccer Team

- 4-time Academic All-Conference Selection, 2016 Team Captain

August 2013 – November 2016

Sigma Chi Fraternity

Treasurer

April 2014 – May 2017

February 2015 - January 2016

DEREK URBEN

3034 N. Farwell Ave. • Milwaukee WI 53211 • (608)-575-4126 • durben@uwm.edu

EDUCATION:

University of Wisconsin – Milwaukee

Bachelor of Business Administration

Anticipated Graduation: May 2019

Major: Finance & Economics

Honors College Student

Cumulative GPA: 3.54/4.00

Dean's Honor List: 2015, 2016

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PROFESSIONAL EXPERIENCE:

Briggs and Stratton Corporation

Wauwatosa, WI

Corporate Development & M&A Intern

February 2016–Present

- Manage, update, and analyze a M&A Pipeline of 250+ companies valued between \$10 - \$400 million
- Conduct market / competitive research and company benchmarking in concert with strategic planning
- Research M&A candidates while including qualitative, financial modeling, and valuation analysis
- Communicate with CEO, CFO, SVP's, & Investment Banks to perform due diligence
- Construct, maintain, and enhance the departments M&A analysis tools, templates, and processes

Coinigy Inc.

Milwaukee / Global Team

Chief Financial Officer & Business Development

September 2014 - Present

- Manage ~\$550,000 in business's capital & account for all transactions, payroll, and taxes
- Create budget proposals based on historical month-over-month revenue and expense growth
- Lead B2B sales with global currency exchanges, FX Brokers, hedge funds, & other asset managers
- On board and interact with thousands of new users and customers via email and phone support 24/7

Nord Gear Corporation

Milwaukee, WI

IT & Accounting Intern

October 2015–February 2016

Led internal helpdesk efforts for global employees

- Managed on-site and off-site projects up to \$10,000 in project budgets
- Organized and recorded company's IT assets and expenses

TECHNICAL SKILLS:

- Bloomberg, EVA Express, Capital IQ, & FactSet
- Microsoft Excel, Word, PowerPoint, Access, Visio, SQL, Python / R, and HTML / CSS programming

OTHER ACTIVITIES:

- **2015 – Present:** Student Investment Club– President ('17) & Financials / Technology Analyst ('15-'16)
 - Provided weekly analyst updates, successfully pitched JP Morgan & Chase, and lead the student organization of ~50 students. Obtain school grants and control \$60,000 portfolio
- **2016 – 2017:** Alpha Kappa Psi Professional Fraternity – Co-Chairman of Professional Development Committee
- **2015 – 2016:** Collegiate Entrepreneurship Club – Active member and advisor for start-ups within UWM
- **2013 – Present:** Independent Freelance Web-Design – Coded multiple professional and corporate websites for regional companies in the medical device industry
- Hobbies & Interests: Blockchain technology, Sailing, Windsurfing, Soccer, & Traveling
- Volunteer Activities: Food 4 Kidz, Mozayik Village \$1 Million Fundraiser, & Girls on The Run

M. GUS VANEVENHOVEN

2222 E. Bellevue Pl. Apt # 307 • Milwaukee, WI 53211 • (920) 850-7124 • vaneven7@uwm.edu

EDUCATION

University of Wisconsin – Milwaukee

Master of Science in Management – Financial Analysis

Cumulative GPA: 3.9/4.0

Investment Management Certificate Program (21-Months) (lubar.uwm.edu/IMCP)

- A CFA University Affiliated Program
- Analyze individual securities over multiple asset classes
- Monitor and rebalance portfolios of real money
- Report performance and attribution to internal and external investment boards for over \$7 mil of cumulative AUM

Milwaukee, WI

Anticipated Graduation: May 2019

University of Wisconsin - Oshkosh

Bachelor of Business Administration - Finance

Cumulative GPA: 3.5/4.0

Finance GPA: 3.8/4.0

Oshkosh, WI

Graduation Date: December 2016

Hochschule Osnabrück

Study Abroad – International Business

Osnabrück, Germany

February – July 2015

PROFESSIONAL EXPERIENCE

Francis Investment Counsel

Research Analyst

- Assist with coverage of investment managers and global capital markets
- Contribute to manager searches, asset allocation optimizations, and client portfolio management

Brookfield, WI

October 2017- Present

Northern Trust Corporation

Global Operations Analyst, Fixed Income

- Administered assets for complex hedge fund client within a fast-paced environment
- Liaised between middle and back office to ensure efficient resolution of breaks and open reconciling items

Chicago, IL

February 2017 – July 2017

Endowment Wealth Management, Inc.

Wealth Management Intern

- Researched/analyzed economic and financial market data, investment strategies, asset classes, investment platforms, asset allocation, risk management, marketing strategy, performance reporting, and compliance
- Created compelling professional content and facilitate delivery of that content through various channels, including our websites, blog, social media, newsletters, and other print/digital outlets
- Assisted Wealth Management Director with the creation and implementation of wealth plans/strategies

Appleton, WI

May 2016 – December 2016

Student-Managed Endowment Fund (UW-Oshkosh)

Portfolio Manager & Analyst

- Led a team of 10 student analysts during the summer semester course, while working a full-time internship
- Oversaw a \$750,000+ portfolio & asset allocation in addition to analyst duties; primarily industrials sector equity analysis and research

Oshkosh, WI

January 2016 - August 2016

OTHER ACTIVITIES

- CFA Level II Candidate – June 2018
- Member of UW-Oshkosh team that won the Wisconsin – Madison “local” CFA Institute Research Challenge with a report covering A.O. Smith and was amongst the top 10% in North America to advance to the “regional final” in Seattle – winter 2017
- Extensive experience with Morningstar, FactSet, Bloomberg, Envestnet, Microsoft Office, including Word, PowerPoint, Publisher and Excel, as well as social media with business application

TRAVIS WIEDMEYER

802 E Glendale Ave Apt # 1 • Milwaukee WI 53211 • (262) 365-4452 • wiedme23@uwm.edu

EDUCATION:

University of Wisconsin – Milwaukee

Bachelor of Business Administration

Anticipated Graduation: May 2019

Major: Finance, Minor: Mathematics

Cumulative GPA: 3.92/4.00

Major GPA: 3.91/4.00

Dean's Honor List: 2016, 2017

Investment Management Certificate Program (21-Months) (lubar.uwm.edu/IMCP)

- A CFA University Affiliated Program
- Analyze individual securities over multiple asset classes
- Monitor and rebalance portfolios of real money
- Report performance and attribution to both internal and external investment boards for over \$7 M of cumulative AUM

University of Wisconsin – Washington County

Major: General Studies AAS

2014–2016

Cumulative GPA 3.25/4.00

Dean's Honor List: 2014, 2015

West Bend Mutual Scholarship Recipient

PROFESSIONAL EXPERIENCE:

Xela Capital – Independent Trader

Seattle, WA

Trading Analyst Intern - Remote

September 2017–January 2018

- Report data from earnings releases in support of trading activities
- Participate in weekly meetings with head trader when trades are reviewed in detail

Elite Nutrition

West Bend, WI

Sales Associate

May 2016–December 2016

- Operated store independent of direct management
- Handled sales, customer service, daily reconciliation of payments and sales

S&I Masonry

West Bend, WI

Laborer

February 2015–April 2016

- Often completed client projects without owner oversight
- Installed concrete, block foundations, and different forms of stone and brick

TECHNICAL SKILLS:

- Bloomberg, EVA Express, and FactSet
- Microsoft Excel, Word, and PowerPoint

OTHER ACTIVITIES:

- Student Investment Club–Vice President **May 2017–Present**
 - Managed and led the club on both the investment and administrative side
- Student Investment Club–Technology Sector Analyst **August 2016–May 2017**
 - Researched and pitched new stocks for purchase and monitored positions
- Kappa Sigma Fraternity–Grand Treasurer **November 2016–Present**
 - Responsible for all financing and budgeting for Tau-Tau chapter
- Amplify Trading–Certificate in Portfolio Management in Practice **November 2016**
 - Participated in intensive ½ day practical experience in portfolio management using market simulation with real market data and news
 - Outperformed benchmark by 12% over one year span using multi-asset portfolio