

JD Audena

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EDUCATION

University of Kentucky – Gatton College of Business

Bachelor of Business Administration in Finance; Minor in Business Analytics

▪ Transfer GPA: 4.00/4.00

▪ Membership: Finance Society, Analytics Club, Consulting Club, Black Student Union

Lexington, KY

Class of 2023

WORK EXPERIENCE

The Ritz-Carlton New York, Central Park

Assistant Front Office Manager

- Directed a staff of approximately 24 ladies and gentlemen in providing the gold standard of personal service and facilities, in a high demand, fast paced, ultra-luxury environment
- Implemented a new procedure for capturing, analyzing, and reporting data from non-revenue generating activities for use by our asset management team in maximizing the value of a \$250MM asset

New York, NY

February 2020 — October 2020

Newark Liberty International Airport Marriott

Rooms Operations Manager

- Department finance liaison - leading initiatives for revenue growth in retail, RevPar, and achieving a 95% sellout efficiency over one year; responsible for purchasing, invoicing, and reconciling department expenses
- Lead facilitator for VIP arrivals, requests, and guest relations; using Salesforce as a tool for consumer data analysis and helping team members remain accountable for tracking, resolving, and developing processes to eliminate poor product experiences

Newark, NJ

January 2019 — February 2020

TownePlace Suites by Marriott

Operations Manager

- Strived to continually improve guest and employee satisfaction while maximizing the financial performance of the departments under my direct purview, in a select service, \$5MM asset with variable occupancy

Lawrence, KS

May 2017 — October 2018

Pipeline Productions LLC

Business Operations and Finance Assistant

- Used QuickBooks software to execute internal accounting to ensure accuracy in the allocation of funds between 14 different and interactive companies with revenues in excess of \$12MM

Kansas City, MO

June 2014, March 2015 — May 2016

Sharp Connections LLC

Campaign Management and Consulting Assistant

- Used analysis of precinct voting data for public engagement strategy, targeting individual voters and developing strategic outreach in person, as well as via telephone, mail, and media

Johnson County, KS

April 2016 — November 2016

LEADERSHIP & PROFESSIONAL DEVELOPMENT

SEO Career

SEO EDGE Participant

- Receive coaching and online instruction and learn business fundamentals to compete for internship opportunities
- Complete industry-specific training and assessments focused on developing technical skills, institutional knowledge, and attention to detail

Marriott International Retail Business Council, Member

- Appointed by team leaders to represent our property on council advising corporate and other hotel leaders on strategies for retail revenue growth based on our successful 20% increase YoY

The Leadershape Institute

- Nominated to participate in an immersive leadership training that prioritizes teaching high potential individuals to live and lead with integrity

The American Legion Boys' Nation, Senator

- Elected by 500 peers as one of two representatives of Kansas at a national leadership and patriotic advocacy program, that consisted of meetings with legislative leaders, including the President of the United States

OTHER SKILLS & INTERESTS

Certifications: Bloomberg Market Concepts

Languages: Elementary French

Skills: Proficient in Excel, Power Point, Basic training in Access, Basic Python

Interests: Kansas City Chiefs, Baltimore Ravens, College Basketball, Running, Traveling, Landscape Photography, Bourbon, and Foodie

Maddie Berezowitz

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EDUCATION

University of Kentucky Lexington, KY
B.B.A in Finance and Business Management Expected Graduation – Dec 2022

- **Cumulative GPA: 3.93/4.0**
- **Honors:** Dean's List, SEC Honor Roll, Athletic Director's Honor Roll, Pelissier Scholar
- **Scholarships:** Bluegrass Spirit Scholarship, Cousins Subs Wisconsin Sports Award, Athletic Scholarship
- **Relevant Coursework:** Corporate Finance, Financial Accounting, Managerial Accounting, Intermediate Accounting, Investment Analysis, Capital Investment
- **Wall Street Scholars:** 1 of 20 students selected across campus to participate in a program through an advanced curriculum and tightly coordinated, exclusive co-curriculum activities

WORK EXPERIENCE

Tradeweb Markets LLC New York City, NY
Incoming Summer Analyst Summer 2021

University of Kentucky Athletic Department Business Office Lexington, KY
Intern Jan 2020 – Present

- Balance debit and credits (\$83.6 million budget) in appropriate accounting systems – *Blackbaud and SAP*
- Organize department-wide expenses in the form of Payment Request Documents, Purchase Orders, and Travel Vouchers
- Match invoices with correct credit card charges in order to track and reimburse expenses in Expensify

Special Education Paraprofessional Burlington, WI
Burlington Area School District Dec 2019 – Present

- Work with students with special needs to meet goals in their individualized educational plans

EXTRACURRICULAR ACTIVITIES

University of Kentucky Volleyball Team Lexington, KY
Student-Athlete May 2019 – Present

- Competes at the NCAA Division I level, participates in the NCAA Volleyball Championship, Sweet 16, currently ranked #3 in nation per the AVCA (2020-2021)
- Manages a schedule including 19 hours of classes, 20 hours of study time, 40 hours of practices and treatments, and several matches a week in season
- Accepted a preferred walk-on position out of high-school (no athletic scholarship) but earned an athletic scholarship in the spring of 2021

Student-Athlete Advisory Committee (SAAC) Lexington, KY
Trainee Aug 2020 – Present

- Participates in monthly meetings to discuss athletic legislation, community service projects, etc.

Finance Society Lexington, KY
Member Jan 2021 – Present

- Collaborates with 20+ business students and graduates on by seeking their counsel and using their network to learn more about investment banking

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: PowerPoint, Excel, Word, Expensify, Blackbaud

Activities: Fellowship of Christian Athletes, Emerging Leaders, My New Kentucky Home Ambassador, Special Olympics

Interests: Volleyball, Basketball, Golfing, Yoga, Agriculture, Podcasts (The Journal and NPR), Faith, Government, Card Games, Reading (Bob Goff and Malcolm Gladwell)

Yong Bin Thomas Cho

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EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance

May 2023

- **Cumulative GPA:** 4.0/4.0

Wall Street Scholars and Pelissier Scholars: 1 of 20 students selected across campus to participate in advanced finance curriculum, technical training, exclusive co-curriculum and career development opportunities

WORK EXPERIENCE

Joe's Beauty Supply

Louisville, KY

Co-manager

Nov 2016 – Aug 2020

- Interacted and clearly communicated with 500+ customers daily to identify individual needs and provide positive solutions
- Restocked \$10,000+ of merchandise weekly
- Oversaw security recordings during store hours to prevent loss

The Study

Lexington, KY

Peer Tutor

Aug 2020 – Present

- Fostered discussion among fellow tutees on content concepts and theories
- Stimulated critical thinking among tutees through cooperative argumentative dialogue
- Enhanced student learning by utilizing a wide range of instructional approaches to cater to individual student needs

EXTRACURRICULAR ACTIVITIES

Finance Society

Lexington, KY

Member

Sept 2019 – Present

- Attend weekly meetings and network with distinguished faculty and alumni with financial backgrounds to learn about existing career opportunities

Alpha Kappa Psi

Lexington, KY

Fraternity Judiciary Committee

Sept 2019 – Present

- Participate in weekly meetings for training modules in preparation for professional development and maintained relationships with more than 100+ actives
- Maintain resources and tools within the chapter to assist with risk management
- Investigate the conduct of chapter members and guests that may have violated fraternity specific policies

CRU

Lexington, KY

Seminar Coordinator

Aug 2019 – Present

- Plan and organize logistics of weekly religious seminars consisting of 150+ concurring attendees
- Spearheaded and monitored weekly religious seminars and livestream logistics

SKILLS & ACTIVITIES

Languages: Fluent in Korean

Certifications & Training: *Wall Street Prep* Financial and Valuation Modeling Bootcamp, Bloomberg Market Concepts (BMC)

Technical Skills: Python, Excel

Isabel Chumbler

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EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance and B.S in Accounting.

Aug 2019 – May 2022

- **Cumulative GPA:** 4.00/4.00
- **Honors:** University of Kentucky Presidential Scholarship (full tuition), Dean's List
- **Wall Street Scholars:** 1 of 20 students selected across campus to participate in accelerated business curriculum, technical training, exclusive co-curriculum and career development opportunities
- **Pelissier Scholars:** 1 of 15 students selected to participate in valuable networking opportunities, professional development, and virtual meetings with finance firms

WORK EXPERIENCE

University of Kentucky Department of Finance & Quantitative Methods

Lexington, KY

Undergraduate Research Assistant

Jan 2020 – Current

- Collecting data on finance faculty research at public & private universities from academic journals

Baird

Bowling Green, KY

Private Wealth Management Intern

May 2020 – Aug 2020

- Support various projects from Financial Advisors (i.e. review reports, research stocks, money managers and funds and investment strategies).
- Prepare for client meetings/presentations; Create quarterly performance reports and distribute to clients.
- Perform additional duties (i.e. process paperwork/documents) and assist with projects as assigned.

Lexington Parks and Recreation

Lexington, KY

After School Recreation Leader

Jan 2020 – May 2020

- Led exciting games, activities and lessons for children through recreation, art, and education

Bowling Green Parks and Recreation

Bowling Green, KY

Summer Children's Camp Counselor

May 2019 – Aug 2019

- Plan and led engaging, fun activities for children by actively seeking unique recreational activities, arts and crafts, and educational activities. Monitored kids in classroom, gym, outdoor, and fieldtrip settings

EXTRACURRICULAR ACTIVITIES

Gatton Academy of Mathematics and Science

Bowling Green, KY

Admissions Ambassador

May 2018 – May 2019

- Gave weekly campus tours to groups of ~20 visitors; Wrote monthly blog posts about student life
- Served on panels with 7 other ambassadors in an auditorium of ~100 people to answer questions

Western Kentucky University Department of Chemistry

Bowling Green, KY

Research Assistant

Aug 2017 – May 2019

- Conducted independent Chemistry research in a university lab titled "Mercury Bioaccumulation in Bats from Mammoth Cave National Park" and presented at Kentucky Academy of Sciences Conference (3rd place, poster presentation) and Western Kentucky Student Research Conference (2018, 2019).
- Analyzed mercury levels in 270 total samples of bat hair provided from Mammoth Cave National park using the LECO AMA 254 Mercury Analyzer. Operated machinery in a safe and efficient manner, running blanks and standards as measures of Quality Assurance and Quality Control

OTHER INFORMATION

Certifications & Training: Bloomberg Market Concepts (BMC), CPR, Java, Mathematica, Basic in Python

Software: Proficient in Excel, PowerPoint, Word, Capital IQ, Tableau

Activities: Finance Society, University of Kentucky Christian Student Fellowship, Tutoring/Child Care Services, Study Abroad (Costa Rica and England)

Interests: Backgammon, Board Games, Chess, Cooking, Hiking, Indoor Cycling

Ben Davison

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EDUCATION

University of Kentucky

Lexington, KY

B.S. in Economics and B.B.A. in Finance with Minor in Mathematics

May 2023

- **Cumulative GPA: 4.00/4.00**

- Scholarships: Patterson Scholarship (Full Ride as National Merit Scholar) and Pelissier Scholarship (1 freshman per year)
- Wall Street Scholar & Pelissier Scholar: selected for accelerated curriculum and exclusive career development activities
- 2021 Econ Games 1st Place: “Consumer Spending, Small Business, & the Covid Crisis”

Western Kentucky University - Gatton Academy

Bowling Green, KY

High school diploma with specialization in Mathematics and Computer Science

Class of 2019

PROFESSIONAL EXPERIENCE

Castellan Group

Louisville, KY

Research Intern

Dec 2020 – Present

- Conduct research projects in Python to explore various investment opportunities, primarily in equity/derivative markets
- Create Django website and various tools to help price derivatives and other instruments in order to inform trading

Key.Me

New York, NY

Analytics Intern

May 2020 – Aug 2020

- Created Tableau dashboards with Python and SQL to monitor key company data such as Google Search performance and promo code usage to increase customer interactions and boost customer experiences
- Conducted market analysis to make recommendations to management on expanding services to new geographical regions

BIM Group

Lexington, KY

Financial Analyst Intern

Aug 2019 – Mar 2020

- Prepared financial reports and built out metrics for over 100 clients with employee benefits consulting needs

Fehr and Peers

Los Angeles, CA

Data Analyst Intern

May 2018 – Jun 2018, May 2019 – Jun 2019

- Performed data analysis in Excel, Python, Java, and SQL to 50+ transportation projects involving traffic studies and transit network analysis, accelerating several data collection and analysis phases of client projects

Western Kentucky University

Bowling Green, KY

Undergraduate Research Assistant

Oct 2017 – May 2019

- Researched analysis of financial data using Python for a research faculty member, exploring techniques such as volatility modeling, time series models, and other various regression models, resulting in developed trading strategies

PROJECTS/EXTRACURRICULARS

University of Kentucky Department of Economics

Lexington, KY

Research Assistant

Jan 2021 – Present

- Collect, clean, and prepare macroeconomic data for use in faculty research projects

Chalkline Sports Research Project

Dec 2020 – Present

- Explore the US Sports Betting market to analyze the current industry position and project future performance by state

University of Kentucky Department of Finance and Quantitative Methods

Lexington, KY

Teaching Assistant

Jun 2020 – Present

- Design, create, and teach Python lessons for freshman and sophomore finance scholars

University of Kentucky Basketball

Lexington, KY

Student Video Worker

Aug 2019 – Present

- Manage scouting database of team schedules and game film

ADDITIONAL INFORMATION

Software: Advanced Python/Django, Advanced Excel, Tableau, SQL, Mathematica, STATA, R, Java, QGIS, L^AT_eX

Training: Wall Street Prep Financial & Valuation Modeling Certification

Interests: Professional/College Basketball, Cycling, Sabermetrics/Basketball Analytics, Poker, Chess

Curtis Dom

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EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance; Minor in Business Analytics

May 2023

B.B.A in Accounting; Minor in Political Science

- **Cumulative GPA: 3.69/4.00**
- **Honors:** Dean's List, Bluegrass Spirit Scholarship, Wall Street Scholars, Pelissier Scholars
- **Relevant Coursework:** Corporate Finance, Financial Accounting, Managerial Accounting, Intermediate Accounting, Economic and Business Statistics, Technology for Business Solutions

WORK EXPERIENCE

University of Kentucky Endowment Fund

Lexington, KY

Investment Intern

August 2021 – May 2022

The Eden Mandate

York, PA

Finance Intern

June 2020 – Present

- Participate in raising private capital to amplify the growth of real estate investments
- Develop plans to acquire, remodel, and lease properties including calculating revenue, cash flows, and ROI of the property
- Assist in the day-to-day operations of remodeling houses, staying in contact with investors and clients, and managing a \$1.5MM+ Real Estate Portfolio

Dom House Shipping

York, PA

Founder

July 2020 – Present

- Lead a team of 10 to source contracts/direct shipping lanes across the US, Mexico and Canada
- Serve as a liaison in negotiations between freight brokers and clients

Four Squares Development

York, PA

Chief Financial Officer

July 2020 – Present

- Direct all finance activities in the company
- Develop organizational structure to optimize tax liability
- Work towards creating a Donor Advised Fund and manage the fund's assets and donor relations (\$1MM+ pledged)
- Work with city officials to acquire and revitalize blighted properties

FAB Group Logistics

York, PA

Finance Intern

June 2020 – March 2021

- Complete payroll using ADP Run software on a weekly basis
- Assist in managing drivers and day-to-day operations of the company
- Complete accounting bookwork using Wave software and financial modeling for the company
- Assist in recruitment efforts to hire more drivers and fleet managers as necessary

SKILLS, ACTIVITIES & INTERESTS

Certifications & Training: Bloomberg Market Concepts, Capital IQ, Excel, Microsoft Office, ADP, Wall Street Prep Financial Modeling & Valuation Bootcamp (Oct. 2020)

Service: Boy Scouts of America (Eagle Scout), Central York High School Speech and Debate Team

Extracurricular Activities: Sigma Alpha Epsilon Fraternity, University of Kentucky Water Polo, Wildcat Investors, Business Enterprise LLP, First-Year Forum

Interests: Hockey, SEC Football, Non-Fiction Books, Public Speaking, Podcasts

Will Frye

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EDUCATION

University of Kentucky

Lexington, KY

B.B.A. in Economics and Finance

May 2023

- **Cumulative GPA: 3.92/4.0**
- **Wall Street Scholars Program:** 1 of 20 finance students selected across campus to accelerate career development success through an advanced curriculum and tightly coordinated, exclusive co-curricular activities
- **Global Scholars Program:** 1 of 32 students selected to participate in a holistic academic program with co-curricular components, specialized curriculum, professional and leadership development, and networking opportunities
- **Relevant Coursework:** Corporate Finance, Financial Accounting, Microeconomics, Macroeconomics, Statistics

PROFESSIONAL EXPERIENCE

Black Dog Real Estate, LLC

Lexington, KY

Owner

Dec 2019 – Present

- Look for homes to purchase and rent out for profit in Lexington area
- Manage leases for tenants in different properties and work to improve their living situation

BlackSummit Financial

Nicholasville, KY

Incoming Summer Analyst

May 2021

Keene Trace

Nicholasville, KY

Club Finance Intern

Jun 2020 – Aug 2020

- Shadowed club general manager of the ~600-member country club to gain insight into how a local, mid-size business is operated
- Assisted in tasks such as closing the monthly books, managing golf shop inventory, and creating billing invoices

Keene Trace

Nicholasville, KY

Pool and Gym Manager

May 2019 – Aug 2019

- Maintained and cleaned club gym and pool equipment while assisting members in the facilities
- Open and close the fitness center at appropriate times to conserve energy and keep it functioning for members

EXTRACURRICULAR ACTIVITIES

Serve the City Nicholasville

Nicholasville, KY

Founding Member/Student Leader

Jun 2015 – Aug 2019

- Built relationships with ~100 underprivileged children alongside ~30 volunteers in Nicholasville
- Served ~15 families in a variety of ways such as childcare, lawn service, and financial support through funds provided by a local church

LCA Student Council

Lexington, KY

President/Chaplain

Aug 2015 – May 2016, Aug 2018 – May 2019

- Served as a voice for ~500 students and faculty within the class of 2019
- Planned several school-wide activities such as social events and food drives for local nonprofits

LCA Chamber Choir

Lexington, KY

Member/Chaplain

Aug 2016 – May 2018

- Served on a 10-person leadership team within the choir of ~60 people
- Performed a concert for ~1,500 people at Carnegie Hall in New York City

ADDITIONAL INFORMATION

Certifications: Bloomberg Market Concepts (BMC), Wall Street Prep Valuation Modeling Bootcamp

Software: Proficient in Microsoft Excel, Basic in Capital IQ, Basic in Python

Interests: University of Kentucky and NBA Basketball, Poker, Travel Abroad

Jake Keys

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EDUCATION

University of Kentucky Lexington, KY
B.B.A in Finance and B.A in Mathematics May 2023

- **Cumulative GPA:** 3.94/4.00; **ACT:** 35
- **Honors:** National Merit Scholar, Lewis Honors College
- **Scholarship:** Patterson Scholarship (full tuition and expenses)
- **Wall Street Scholars:** 1 of 20 students selected across campus to participate in a program through an advanced curriculum and tightly coordinated, exclusive co-curricular activities
- **Relevant Coursework:** Calculus I-III, Linear Algebra, Probability, Macroeconomics, Corporate Finance, Investments, Intermediate Financial Accounting

PROFESSIONAL EXPERIENCE

Aristides Capital, LLC Toledo, OH
Intern Feb 2021 – Present

- Perform fundamental research on small-cap equities in actively managed short book
- Back test quantitative trading strategies and program trading algorithms using Python & SQL
- Generate actionable ideas for two pooled-investment vehicles of combined \$140MM in AUM

Wall Street Scholars Program, Gatton College of Business Lexington, KY
Python Co-Instructor May 2020 – Present

- Create extensive lesson plans for teaching freshmen basic Python programming
- Teach finance-focused curriculum to meet basic proficiency standards and introduce financial modules

Department of Finance and Quantitative Methods, Gatton College of Business Lexington, KY
Student Research Assistant Sept 2019 – Present

- Lead a university-wide team of 8 in charge of collecting data for proprietary national research rankings
- Provide web-scraping programs for department chair to create a CFP database

Family Investments Management Mt. Washington, KY
Sole Portfolio Manager Aug 2014 – Present

- Manage multiple retirement accounts of family members providing annualized return of 14% over 6 years
- Actively manage \$100,000+ portfolio to meet financial goals achieving a return of 40% over the last 2 years

EXTRACURRICULAR ACTIVITIES

UK Stock Pitch Competition Lexington, KY
2nd Place Finalist Feb 2021 – April 2021

- Pitched short position in Plug Power, Inc. (NASDAQ:PLUG) due to high valuations and fundamental flaws
- Successfully defended pitch in front of three investment professionals, earning 2nd place out of 16 teams

UK Finance Society Lexington, KY
VP of Internal Relations Jan 2020 – Dec 2020

- Managed bi-weekly newsletter publication with an audience of 600+ readers
- Served as communication liaison between members and officer team

SKILLS, ACTIVITIES & INTERESTS

Languages: Conversational Proficiency in Spanish
Technical Skills: S&P Capital IQ, Intermediate HTML, Advanced Python
Certifications/Trainings: Bloomberg Market Concepts, Wall Street Prep Valuation & Excel Modeling Bootcamp
Activities: Finance Society, Intramural Basketball
Interests: Basketball, Public Equity Markets, Soccer, Reading

Riley Hoskins

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EDUCATION

University of Kentucky Lexington, KY
B.B.A in Finance | minor in Computer Science May 2023

- **Cumulative GPA:** 3.6/4.0
- **ACT Score:** 34
- **Scholarships:** Presidential Scholarship (Full Tuition)
- **Wall Street Scholars:** 1 of 20 students selected across campus to participate in accelerated business curriculum, technical training, exclusive co-curriculum and career development opportunities
- **Relevant Coursework:** Statistics, Computer Science, Accounting, Management, Economics

PROFESSIONAL EXPERIENCE

KeyMe Locksmiths New York, NY
Data Analytics Intern May 2021 – Aug 2021

Pepperpointe Partnerships Lexington, KY
Accounts Payable Clerk Sep 2020 – Jan 2021

- Supported the finance department with biweekly sweeps of partners accounts, assisted in facilitating the largest DSO acquisition in history (37), supported insurance department in processing dental claims

Bluegrass Cut and Sew Liberty, KY
Industrial Machine Operator May 2020 – Aug 2020

- Operated various industrial sewing machines to manufacture personal protective equipment for various local hospitals and COVID-19 testing clinics
- Performed quality control on finished products to make certain no defects were present

EXTRACURRICULAR ACTIVITIES

Future Business Leaders of America Liberty, KY
State Officer May 2017 – May 2018

- Planned, facilitated, and spoke at each of the various state-sponsored conferences including the State Leadership Conference with 2,000+ members

National Competitor Aug 2016 – July 2019

- Competed against the top 100 among 235,000 at the national level for three consecutive years in insurance and risk management as well as securities and investments

Phi Beta Lambda – University of Kentucky Lexington, KY
Outreach Chair Aug 2020 – Current

- Planned and facilitated monthly meetings including workshops, guest speakers, etc.
- Planned, organized, and facilitated volunteer events including the Wildcat Wardrobe business attire clothing drive through contacting the organization and scheduling member volunteers

ADDITIONAL INFORMATION

Technical Skills: Proficient in Python, JavaScript, C++
Certifications & Training: Microsoft Office Specialist (Word, Excel, PowerPoint), Bloomberg Market Concepts (BMC), JMP Pro, Tableau
Interests: Chess, Piano, Tennis, Skiing, eSports

Grant Charles Lee

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EDUCATION

University of Kentucky – Bachelor of Business Administration in Finance
Gatton College of Business and Economics

May 2023
Cumulative GPA: 4.0

- **Goldman Sachs Diversity Insight Series** – 1 of 2,600 applicants accepted into a program designed to educate sophomores on topics such as networking, resume skills, and interview tactics
- **Wall Street Prep Financial & Valuation Modeling Seminar** – Learned how to build fully functioning and dynamic Financial and Valuation models as well as become proficient in DCF; taught by experienced finance professionals
- **Global Scholars Program** – 1 of 30 students selected for a leadership cohort who take business classes together and promote an understanding of cultural awareness, leadership, and intercultural skills in the business world
- **Wall Street Scholars Program** – 1 of 20 students selected for an elite cohort who prepare for prestigious finance career opportunities through networking and technology certifications

PROFESSIONAL EXPERIENCE

University of Kentucky Athletics – Senior Photography Intern

August 2019 – Present

- Create photographs used for all University of Kentucky Athletics marketing departments and social media
- Photographs have made 2,743,159+ impressions on social media
- Only intern to travel with athletic teams to photograph events on the road

Photogenic Inc. (Gateway Arch/ Grant's Farm) – Supervisor

July 2018 – August 2020

- Generated over \$40,000 in revenue and engaged with 26,000 guests weekly
- Supervised 8 sales associates in photography, editing, printing, and sale of 21,000 pictures weekly
- Developed communication and problem-solving skills while addressing interpersonal conflict

EXTRACURRICULAR ACTIVITIES

Finance Society – President

January 2021 – Present

- Drive the mission and vision of The Finance Society
- Coordinate with 6 board members to carry out various goals
- Facilitate the implementation of various new programs and initiatives

Alpha Kappa Psi Business Fraternity – Corporate Relations Chair

May 2020 – Present

- Establish strategic partnerships with businesses around Lexington to generate revenue and awareness
- Collaborate with the Executive Board to secure sponsorships for Fraternity events

Phi Sigma Theta Honor Society – Distinguished Member

February 2020 – Present

- Displayed commitment to community service, leadership positions, and academic performance
- Actively participate in professional programming offered by Phi Sigma Theta

Finance Society – Vice President of Marketing

December 2019 – January 2021

- Created all marketing material, photographed, and advertised meetings and events on LinkedIn.
- Increased awareness and grew the active club base by 40 members

UK 101 Class – Teachers Assistant

May 2020 – December 2020

- Developed lesson plans and presentations for class of 30 Global Scholars Pathway students
- Worked closely with Dr. Serenity Wright to teach and adapt the class

Alpha Kappa Psi Business Fraternity – Pledge Class Liaison

February 2020 – May 2020

- Elected by 24 pledges to represent them as a link between the Pledge Class and Pledge Educators
- Communicated with top executives to inform the Pledge Class of events happening throughout the pledge process

ADDITIONAL INFORMATION

Certifications – Bloomberg Market Concepts, Wall Street Prep Financial & Valuation Modeling

Software – Python, Microsoft Suite, Adobe Photoshop, Social Media

Interests – Golf, Photography, Blackjack, Traveling, Banking

Chris Lucas

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EDUCATION

University of Kentucky

B.B.A in Finance and B.S. in Economics

Lexington, KY

Graduation Date: *May 2023*

- **Cumulative GPA: 3.9/4.0**
- **Scholarships: Patterson Scholar, Pelissier Scholar**
- **Relevant Coursework:** Economics, Econometrics, Financial Accounting, Managerial Accounting

WORK EXPERIENCE

Advent International

Incoming Private Equity Summer Analyst

Palo Alto, CA

Jun 2021 – Aug 2021

Signal 88 Security

Market Sales Intern

Philadelphia, PA

May 2020 – Aug 2020

- Developed individualized security patrol contracts for apartment complexes in 4 different franchise locations
- Performed lead development, follow up, and contract negotiation to 426 property managers
- Grossed \$27,997.74 in monthly recurring team revenue

Stride Funding

Business Development Intern

Boston, MA

Mar 2020 – Aug 2020

- Researched political and legal implications of Income Share Agreements (ISA) and financial impact of higher education influencers by surveying academic databases
- Developed database of all ISA financiers to determine reliability and benefit awareness as the most effective branding strategy
- Organized weekly presentations to address the ISA competitor landscape senior employees

Black Soil LLC

Student Consultant

Lexington, KY

Jan 2020 – May 2020

- Led a team of 4 responsible for conducting an entrepreneurial audit of an agritourism company's vision and mission
- Generated over 100% increase in funding and revenue sources by developing more effective community outreach partners and marketing tools

EXTRACURRICULARS

University of Kentucky Debate Team

Policy Debater

Lexington, KY

Aug 2019 – Present

- Achieved a 63% elimination round participation rate as a freshman
- 1 of 2 Kentucky teams qualified to the National Debate Tournament my freshman and sophomore year

University of Kentucky Consulting Club

Vice President of Recruitment

Lexington, KY

Dec 2019 – Dec 2020

- Co-founded the club to instruct on case-method problems and technical business skills
- Increased overall membership to 30 students in first semester

Bluegrass Debate League

Volunteer Instructor

Lexington, KY

Aug 2020 – Present

- Organized weekly after-school public speaking lectures and practice debates for 40+ middle and high schoolers
- Provided developmental support and judging to programs in Kentucky to reinvigorate the local debate community

SEO Career

SEO Success Participant

New York, NY

Aug 2020 – Present

- Received 100+ hours of individualized coaching and online instruction to achieve targeted professional developmental goals mainly around technical and soft skills training
- Mastered fundamentals specific to private equity and investment banking in order to be an maximize efficiency during my internship

ACTIVITIES & INTERESTS

Activities: Consulting Club, Finance Society, Honors College Ambassador, Sigma Phi Epsilon, Student Government

Skills and Certifications: Bloomberg Markets Concepts, Capital IQ, Excel, PowerPoint

Interests: Sports, Kansas City Chiefs, Kentucky Basketball, Outdoor Education, Paintball

Kyle D. Matre
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EDUCATION

University of Kentucky **Lexington, KY**
B.B.A in Finance and Economics Graduation Date: May 2023

- **Cumulative GPA: 4.0/4.0**
- **Relevant Coursework:** Macroeconomics, Financial Accounting, Microeconomics, Calculus, Business Statistics, Marketing, Management, Excel

WORK EXPERIENCE

Widen's Restaurant **Orland Park, IL**
Cashier *February 2019 - December 2019*

- Worked in a team oriented, fast paced environment to meet clients' needs.
- Effectively multitasked to fulfill various roles including food-prep, cashiering, and customer service.
- Developed excellent cash handling skills.
- Maintained various social relationships with frequent customers.

BK'S Lawn Care **Orland Park, IL**
Landscaper/Founder *April 2017- July 2019*

- Acted in an entrepreneurial fashion to establish a lawn care and landscaping service with a classmate.
- Utilized verbal and written communication to develop and maintain 20+ client relationships.
- Was able to think analytically to maintain effectively priced services to remain competitive.
- Performed our client's landscaping needs in a professional and timely matter working as a team and independently.

Jewel Osco **Orland Park, IL**
Customer Service Clerk *May 2018 - August 2018*

- Worked with cashiers in a team-oriented manner, providing clients with an efficient checkout process.
- Provided excellent customer service and assisted clients with taking groceries to their cars.
- Assisted customers with their needs throughout the store.

Student Involvement

University of Kentucky Finance Society **Lexington, KY**
Society Member *August 2020- Present*

- Attend guest speaker lectures, resume workshops, education seminars, and social events.
- Member of this student-driven organization that works in conjunction with faculty and alumni to help students with learning opportunities outside the classroom and career development.

Varsity Golf Captain **Orland Park, IL**
Golf Captain *October 2017 – May 2019*

- Voted to be captain of the Carl Sandburg High School varsity golf team for two years.
- Teamwork oriented outlook towards conference, regional, sectional and state championships.

Silver Lake Country Club Golf Instructor **Orland Park, IL**
Youth Golf Instructor *May 2017 – August 2019*

- Instructed new youth members on the mechanics and rules within the game of golf.
- Acted in a leadership role and facilitated team building, instilled golf rules in students, and created and lead character-building activities.

ADDITIONAL INFORMATION

Computer: Proficient in Microsoft Excel, Word, and PowerPoint

Interests: Financial Markets, Economic Policy, College Athletics, Golf, and Major League Baseball.

Jack Mullaney

2501 Poplar Crest Road, Louisville, KY 40207
(502) 550-0123 | jackmullaney8@gmail.com

EDUCATION

University of Kentucky Lexington, KY
B.B.A in Finance, Minor in Business Analytics May 2023

- **Cumulative GPA:** 3.7/4.0
- **Honors:** Dean's List: Fall 2019, Spring 2020
- **Pelissier Scholarship:** 1 of 15 students selected to receive advanced training and participate in virtual visits and network meetings with Wall Street companies
- **Wall Street Scholars:** 1 of 20 students selected across campus to participate in accelerated business curriculum, technical training, exclusive co-curriculum and career development opportunities

WORK EXPERIENCE

University of Kentucky Endowment Fund Lexington, KY
Incoming Endowment Investment Intern May 2021 – Aug 2021

Morgan Stanley Private Wealth Management Louisville, KY
Incoming Private Wealth Management Intern May 2021 – Aug 2021

VWR International LLC, Part of Avantor Lexington, KY
Sales Intern Sep 2019 – Present

- Assist Sales Associate and Sales Manager in procurement of lab accounts on the University of Kentucky's campus
- Promote wide array of research lab products by meeting and maintaining relationships with lab managers

Pepperpointe Partnerships Lexington, KY
Accounting Intern Sep 2020 – Nov 2020

- Pepperpointe partners with dental practices and takes care of their "backroom tasks" such as accounting, insurance, and marketing
- Tasked with retrieving revenue owed from dental practices who are partnered with Pepperpointe

EXTRACURRICULAR ACTIVITIES

University of Kentucky — Finance Society Lexington, KY
Member Oct 2019 – Present

- Attend biweekly meetings to network and connect with alumni and guest speakers in finance

Beta Theta Pi Fraternity Lexington, KY
Member Dec 2019 – Present

- Assist the VP of Finance with the \$200,000 annual budget of a 130-member organization
- Participate in philanthropy and community service events

CERTIFICATIONS, SKILLS & INTERESTS

Languages: Conversational proficiency in Spanish

Certifications: Bloomberg Market Concepts

Technical Skills: Proficient in Microsoft Excel and PowerPoint, JMP, Tableau, Salesforce, Capital IQ

Interests: Golf, Soccer, NFL Football, Stock Investing

Yazan Orabi

1881 Knollmont Dr, Florence, KY 41042
(513) 885-8511 | yaor222@uky.edu

EDUCATION

University of Kentucky

Lexington, KY

Bachelor of Science in Business Administration in Finance

May 2023

- Major: Finance; Minor: International Business
- Cumulative GPA: 3.7
- Relevant Coursework: Business Analytics, Accounting, Finance
- UK Lewis Honors College and Global Scholar Pathway

Community Involvement

Beta Theta Pi Fraternity

October 2020– Present

Lexington, KY

Vice President of Finance

- Managed a \$120,000 semester budget and billed, received, disbursed the fund accurately
- Collected and maintained Chapter due payments and produced financial reports
- Approve funding for chapter purchases and events

University of Kentucky – Student Government Association

November 2019 – Present

Lexington, KY

Senator at Large

- One of four selected students to represent the University of Kentucky freshman class
- Served on the Academics and Student Affairs Committee to allocate SGA’s \$160,000 budget for childcare grants and Research Abroad stipends.

Finance Society

October 2019 – Present

Lexington, KY

Team Member

- Collaborate in career development workshops in industries such as investment banking, private equity, equity research, real estate, corporate finance, private bank, commercial banking, and wealth management.

WORK EXPERIENCE

Century Construction Accounting Division

Aug 2018 – Jan 2019

Erlanger, KY

Accounting Internship

- Worked under the Chief Accounting Officer on the overall financial reporting’s of the company.
 - Assisted with filing and data entry. Prepared balance sheets, income statements, and invoices. Used accounting and financial bookkeeping software and maintaining accurate and complete financial records.
 - Processed bank reports from the companies \$30 million plus withholdings

SKILLS, ACTIVITIES & INTERESTS

Languages: Fluent in English and Arabic

Computer: Certified in Microsoft Word, Excel, PowerPoint, and Access

Certifications: Bloomberg Market Concepts, Microsoft Certified

Interests: Traveling, hiking, Soccer, poker, skiing

Trevor Payne

2029 Bittel Road Owensboro, KY 42301 | (270) 903-0117 | trevorpayne.ky@gmail.com

EDUCATION

University of Kentucky

Lexington, KY

BBA in Finance, BSBA in Economics, Minor in International Business

Graduation Date: *May 2023*

- **Cumulative GPA:** 4.00/4.00; **ACT:** 36
- **Honors:** National Merit Finalist, Lewis Honors College, United States Department of Education Presidential Scholars Program Candidate
- **Scholarships:** Patterson Scholarship, Terry Woodward Scholarship
- **Global Scholars Program:** One of 30 students chosen to participate in a specialized program focused on global business leadership and entrepreneurship
- **Wall Street Scholars Program:** One of 20 students selected across campus to participate in program with an advanced curriculum and tightly coordinated, exclusive co-curricular activities

PROFESSIONAL EXPERIENCE

VonLehman & Co. M&A Advisory

Cincinnati, OH

M&A Investment Banking Summer Analyst

May 2021 – Aug 2021

- Assist senior bankers with M&A, capital raising, and valuation engagements
- Construct financial models to estimate valuation and measure cash flow capacity
- Aid in assembly of business development and CIM material utilized in sell-side marketing process

Institute for the Study of Free Enterprise, University of Kentucky

Lexington, KY

Research Assistant

Aug 2020 – Present

- Research online journals, print resources, and websites to coalesce information in the study of entrepreneurship, free enterprise, and capitalism in the Kentucky/Ohio region
- Collect and log research data to evaluate the impact of Paycheck Protection Program funding on the continuation of businesses in Lexington

German American Bank

Owensboro, KY & Lexington, KY

Banking Intern

May 2020 – Jan 2021

- Innovate internal strategies to grow average relationship profitability a potential 15% year-over-year
- Conducted extensive account analyses to determine how the bank can pivot to maintain and maximize profit

EXTRACURRICULAR ACTIVITIES

Gatton College of Business

Lexington, KY

Gatton Ambassador

May 2020 – Present

- Recruit for Gatton College of Business externally and serve as student-to-administration liaison internally
- Develop and implement events and initiatives geared towards making the Gatton experience worthwhile and engaging

No Limits Productions

Lexington, KY

Founder & President

Mar 2020– Present

- Founded NLP to create a platform for podcasts and other media surrounding business and entrepreneurship
- Work in tandem with various campus stakeholders, team members, and guests to address emerging issues in our state and beyond to educate constituents on utilizing business as a tool to solve problems

Apollo DanceBlue

Owensboro, KY

Head Chair

Aug 2018 – May 2019

- Led 50 student, one year, \$65,000 fundraising effort to fund pediatric cancer research and treatments
- Grew internal fundraising by \$10,000+ year-over-year and raised ~\$185,000 in total in three years

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: Bloomberg Market Concepts Certified, S&P Capital IQ, Wall Street Prep

Interests: Sports Memorabilia Market, Kentucky Basketball, College Football, Bass Fishing

Jayme D Staggs

111 Westgate Drive Lexington, KY 40504
(520) 488-5963 | j.staggs@bloomberg.net

EDUCATION

University of Kentucky – Gatton College of Business & Economics Lexington, KY
B.B.A in Finance May 2021

- **GPA: 4.0 / 4.0**
- **Relevant Coursework:** Corporate Finance, Capital Investment Decisions, Investment Analysis

Community College of the Air Force Maxwell, AL
Associate of Applied Science in Aerospace Ordnance Systems Oct 2017

- **GPA: 4.0 / 4.0**

Eastern Kentucky University Richmond, KY
Bachelor of Arts in Safety and Emergency Management May 2012

- **GPA: 3.5 / 4.0**
- **Relevant Coursework:** Intelligence Analysis, Risk Management, Threat Modeling

PROFESSIONAL EXPERIENCE

Lexmark International, Inc. Lexington, KY
Corporate Planning Intern Jan 2020 – Present

- Head \$400K migration of FP&A Functions of \$3.6B Private Corporation from deprecated database to Adaptive Insights platform, presenting findings directly to Chief Financial Officer
- Perform Forecasting and Modeling for product segments with revenue streams of over \$2.7B

Gatton College of Business & Economics Lexington, KY
Teaching Assistant – Corporate Finance Jan 2020 – Present

- Selected from 450+ students based on outstanding academic performance to perform course administration and offer supplemental instruction to 20+ students weekly
- Provide technical orientation to 50+ students accessing Bloomberg and Capital IQ systems

United States Air Force Seoul, ROK
Ordnance System Supervisor, 51st Munitions Squadron May 2014 – May 2018

- Managed 20+ personnel responsible for safe disposition of \$20M in missile system assets
- Selected from entire Air Force for Pentagon-level weapons test system development program

East Kentucky Center for Science & Mathematics Prestonsburg, KY
Information Technology Administrator Sep 2006 – Sep 2009

- Administered 10+ UNIX client/server systems, developed Python/BASH applications

ADDITIONAL INFORMATION

Technical Skills: S&P Capital IQ, HOLT Lens, Python, R, BASH, JMP, MS Excel, MS PowerBI

Certifications and Training: Bloomberg Market Concepts, *Wall Street Prep* Financial Modeling and Valuation Seminar

Interests: Russian Literature, Blues Guitar, Trail Running

Anne M. Boggess

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(859) 537-3660 | anne.boggess@gmail.com

EDUCATION

University of Kentucky

B.B.A in Finance and B.S in Economics

Minors in International Business and Data Analytics

Lexington, KY

May 2022

- **Cumulative GPA: 4.0/4.0**
- **Scholarships:** KAPT, University, Provost, KEES, Lexington Lions Club
- **Relevant Coursework:** Intermediate Accounting, Intermediate Microeconomics, Macroeconomics, Corporate Finance, Business Statistics

PROFESSIONAL EXPERIENCE

Baird Private Wealth Management

Financial Analyst Intern

Lexington, KY

Jun 2020 – Aug 2020

- Support various projects from Financial Advisors (i.e., review reports, research stocks, money managers and funds and investment strategies)
- Prepare for client meetings and presentations by creating quarterly performance reports

Valvoline

Investor Relations Intern

Lexington, KY

Jan 2020 – Present

- Compile information and conduct detailed qualitative and quantitative analysis on performance reports and documentation for investor meetings
- Assist with the coordination of fundraising and investor roadshow logistics

Russell Capital Management

Finance Intern

Lexington, KY

Sep 2019 – Dec 2019

- Helped develop and present a stock portfolio for a prospective client to add ~\$500k to the \$600 million in accounts
- Completed a research project on the integration of medical devices into everyday life and forecasting for the related sectors

Draper James Southern Lifestyle Brand

Corporate Finance Intern

New York, NY

Jan 2018 – Mar 2018

- Assisted in overseeing negotiations with six third party dealers including Macy's, Dillard's, and Saks Fifth Avenue
- Created line sheets, analyzed equitable pricing, and proofread contracts for third party deals

Central Kentucky Chick Fil-a Marketing

Marketing Team Member

Lexington, KY

Jun 2015 – Jul 2019

- Monitored, measured, and analyzed the effectiveness of marketing initiatives

EXTRACURRICULAR ACTIVITIES

University of Kentucky Investment Banking Club

Vice President of External Relations and Recruitment

Lexington, KY

Aug 2019 – Present

- Oversee active recruitment and outreach to expand the club to finance students
- Reach out to outside interests, including speakers, and other organizations

University of Kentucky Finance Society

Special Chair for the University of Kentucky Stock Pitch Competition

Lexington, KY

Sep 2018 – Apr 2019

- Actively recruited students from various colleges to compete for cash prizes in the Stock Pitch Competition
- Coordinated various aspects of the competition including judges, mentors and event details

University of Kentucky DanceBlue

Team Captain

Lexington, KY

Sep 2018 – Present

- Selected as team captain of 14 peers to coordinate all fundraisers and achieve the team goal of \$4,500 in donations
- Participated in 24 hour no sitting or sleeping dance marathon which raised \$1,880,946 in 2019 for the DanceBlue Oncology and Hematology Clinic

ADDITIONAL INFORMATION

Software: Proficient in Bloomberg, Capital IQ, Excel, Word, and PowerPoint

Interests: Volunteering with special needs, endurance running, non-fiction reading, traveling, and cookie decorating

Kennedy K Ekovich

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(517) 455-4601 | kennedy.ekovich@gmail.com

EDUCATION

University of Kentucky Lexington, KY
B.B.A in Finance and Management May 2022
Minor in International Business

- **Cumulative GPA: 4.0/4.0**
- **Scholarships:** University of Kentucky Bluegrass Scholarship, University of Kentucky Futures Scholarship
- **Relevant Coursework:** Financial & Managerial Accounting, Microeconomics, Macroeconomics

PROFESSIONAL EXPERIENCE

GE Aviation Cincinnati, OH
Financial Management Program Intern May 2020 – Aug 2020

UBS Financial Services Lexington, KY
Intern Oct 2019 – Present

- Compile performance reviews to help generate recommendations for additional clients
- Interact with senior leadership, home office partners and the field while working on key projects

Eagle View Golf Course Mason, MI
Bartender May 2018 – Aug 2019

- Ensured high level of sales by upselling customers by 25% by engaging in conversations along with pushing newer more expensive products
- Processed, balanced, and managed over \$20,000 worth of cash transaction with 100% accuracy

University of Kentucky Campus Recreation Lexington, KY
Facility Assistant Jan 2019 – May 2019

- Welcomed a 15,000+ client base and assisted with exercise related questions, prioritizing safety
- Performed preventative maintenance on fitness related equipment

EXTRACURRICULAR ACTIVITIES

Forte Rising Star Lexington, KY
Campus Representative Jan 2019 – Present

- Help plan and organize workshops for professional development including resume building and negotiation
- Recruit new members by connecting with existing clubs on campus
- Contact businesses to partner with Forte along with being guest speakers
- Forte College Leadership Conference: Selected as one of 120 to attend an exclusive one-day conference out of 300+ applications to explore leadership and business career opportunities for women

Women Business Leaders Lexington, KY
Representative Aug 2019 – Present

- One of the 20 students selected among 100+ students to be paired with a prominent female business leader in the community
- Participate in networking, business visits, community service and outreach projects

ADDITIONAL INFORMATION

Software: Proficient in Microsoft Office and Tableau

Certifications & Training: *Wall Street Prep* Financial Modeling and Valuation Seminar, Bloomberg Market Concepts (BMC) Certification, Capital IQ

Activities: Investment Banking Club

Interests: Equine Sports, Traveling, Volunteering at Humane Society

Avery Evans

268 Kalmia Avenue, Lexington, KY 40508
(502) 744-2163 | averyevans@uky.edu

EDUCATION

University of Kentucky

Bachelor of Science in Accounting

Master of Science in Accounting

- **Cumulative GPA: 3.78/4.00**

- **Relevant Coursework:** Corporate Finance, Intermediate Financial Accounting, Managerial Accounting, Economic & Business Statistics, Excel for Business Solutions, Accounting Information Systems, and Concepts of Income Taxation

Lexington, KY

May 2021

May 2022

<CodeLouisville> Program

Front End Development, JavaScript and React.js Development

- Attended two terms of a software and web development bootcamp to assist in learning coding languages

Louisville, KY

Mar 2019

WORK EXPERIENCE

BKD, CPAs and Advisors LLP

Audit Intern

- Will complete audit testing on financial statements while working with client personnel to reconcile account differences
- Will analyze financial data and help draft management letter comments alongside the audit report

Louisville, KY

Jun 2020 – Aug 2020

Gatton College of Business & Economics

Teaching Assistant: Corporate Finance

- Facilitate active learning with students by working out homework practice solutions and helping students grasp core concepts
- Responsible for mastery of basic financial principles such as time value of money and the capital asset pricing model in order to teach others correctly and understandably

Lexington, KY

Jan 2020 – Present

University of Kentucky, College of Arts & Sciences

Web & Interactive Software Developer

- Program web content and software to be used by the College of Arts & Sciences as promotional material for future students and supplemental information for current students
- Answer and solve help desk tickets from professors and faculty to make changes to the website and solve programming bugs

Lexington, KY

Feb 2019 – Jan 2020

EXTRACURRICULAR ACTIVITIES

Student Leadership University

Summer Staff

- One of 10 summer staff members to help mentor and lead approximately 300 high school freshmen in the SLU 101 training, which teaches students the practical, relational, and life skills needed to change the way they think, dream, and lead
- Helped mentor and lead approximately 1,000 high school sophomores in the SLU 201 training, which builds on the foundation of SLU 101 by equipping students to lead as a catalyst for change by learning from national leaders in Washington, D. C.

San Antonio, TX; Washington, D.C.

Jun 2019 – Jul 2019

Governor's Scholar Program, Northern Kentucky University

Scholar

- Competitively selected by the state of Kentucky out of roughly 2,500 applicants based upon the categories of academic achievement, community service, honors & awards, community recommendation, teacher recommendation, and extracurricular activities
- Attended a five-week program that focused on leadership skills, educational excellency, and community service

Highland Heights, KY

Jun 2017 – Jul 2017

Cru at UK

Campus Ministry Leadership Team

- Help to organize outreach events on the University of Kentucky campus and invite students to Cru small group and large group events
- Meet with 15 to 30 new students who are interested in Cru and network with numerous freshmen in order to build relationships

Lexington, KY

Aug 2018 – Present

ADDITIONAL INFORMATION

Software: Intermediate Excel; Experienced in Bloomberg Terminal, TD Ameritrade thinkorswim, and Fidelity Active Trader Pro; Advanced Adobe Creative Suite

Interests: Soccer, Reading (Economics, Theology, History, Biographies), French Language, Guitar (Blues, Jazz), Specialty Coffee

Ryan Flanigan

112 Aspen Court, Newport, KY 41071
(859) 663-0416 | rflanigan@uky.edu

EDUCATION

University of Kentucky Lexington, KY
B.B.A. in Finance and Accounting, Minor in Business Analytics May 2022

- **GPA:** 3.94/4.00
- **Relevant Coursework:** Corporate Finance, Intermediate Accounting, Business Analytics, Business Management
- **Scholarships and Honors:** Governor's Scholars Program, Dean's List, James Hoffa Memorial Scholarship, Proctor & Gamble Scholarship, Newport Optimist Scholarship, Newport Elks Most Valuable Student Scholarship

Chellgren Freshmen Finance Pilot Program Lexington, KY
Member Aug 2018 – May 2019

- One of eight Freshmen selected across campus for early career development
- Network with accomplished finance professionals in investment banking and private equity

Business Enterprise Living Learning Community Lexington, KY
Member Aug 2018 – May 2019

- Selected to attend business-oriented lectures and live with other high achieving business students
- Networked with business leaders and owners in the Lexington and Louisville areas

Wall Street Prep Seminar Lexington, KY
Student Nov 2019

- Interacted with a former investment banker to build a DCF model and do financial analysis

WORK EXPERIENCE

Kentucky Teacher's Retirement System Frankfort, KY
Investment Intern for the In-House Credit Research Team Oct 2019 – Present

- Conduct research on companies in the high yield and investment grade bond markets
- Build three statement models and credit tear sheets for potential investments in corporate debt
- Responsible for overseeing a \$1 billion portfolio of 26 bonds from 17 companies

LEADERSHIP EXPERIENCE

Phi Sigma Kappa Fraternity Lexington, KY
Treasurer, Librarian, Involvement Officer Sept 2018 – Present

- Efficiently allocate the \$100,000 chapter budget by creating strict limits in each spending category
- Hold members accountable and responsible for meeting payments on time
- Created two new chair positions, librarian and involvement officer, and built a direct reporting structure

2019 Campus Plunge for the Special Olympics of Kentucky Lexington, KY
On-Campus Executive Officer May 2019 – Dec 2019

- Led all activities including fundraising, promoting, planning, and executing the fundraiser
- Raised \$19,391.60 for the Special Olympics with 19.6% Year over Year organic growth in donations

UK First-Year Forum Lexington, KY
Campus Leader Sept 2018 – Sept 2019

- Improved student's welcome week by incentivizing the program through advertisements
- Collaborated with leaders of departments at the university to improve family weekend and the dining experience

SKILLS, ACTIVITIES & INTERESTS

Skills: Tableau, Python, HTML, Excel, JMP, Capital IQ, Bloomberg, FactSet

Certifications: Bloomberg Market Concepts, Capital IQ, Wall Street Prep Modeling Seminar

Activities: Finance Society, Investment Club, Mr. UK Competition, Basketball, Volleyball, Flag Football

Interests: Reading, Python and HTML, Guitars and Music, Backpacking, Baseball and Football

Paul Keaton

1120 University Dr. #513, Lexington, KY 40526 | (606) 616-8616 | Paul.Keaton@uky.edu

EDUCATION

University of Kentucky

Lexington, KY

B.B.A. in Finance and B.S. in Accounting

May 2022

- **Cumulative GPA: 4.0/4.0; ACT: 34**
- **Scholarship:** Patterson Scholarship (sole automatic full-ride scholarship offered by University, awarded to National Merit Scholars)
- **Investment Analysis Practicum:** Invited as one of nine students to manage a \$3.8 million equity portfolio for the University of Kentucky and the Tennessee Valley Authority
- **Relevant Coursework:** Advanced Income Tax, Options and Futures, Financial Risk Management, Calculus II

WORK EXPERIENCE

OGT Engineering & Construction

Midland/Odessa, TX

Finance and Accounting Intern

Jan 2020 – Present

- Automate weekly financial reports for the CFO regarding working capital and project management
- Prepare requested financial statements to respond to sell-side data room requests
- Streamline accounting processes for fixed-asset capital leases and accounts payable

MiddleGround Capital

Lexington, KY

Private Equity Analyst Intern

Sep 2019 – Dec 2019

- Assisted a \$459.5 million fund in its search for lower-middle-market industrial companies in North America
- Reviewed CIMs and other sell-side marketing materials to find prospective portfolio companies
- Edited LBO models and Value Creation Plans (VCPs) to determine projected financial returns
- Learned Lean Manufacturing and the Toyota Production System (TPS) by visiting portfolio companies
- Constructed and maintained a CIM financial database to benchmark incoming investment opportunities

Kentucky Teachers' Retirement System

Frankfort, KY

Securities Analyst Intern

Nov 2018 – Aug 2019

- Utilized Factset and Bloomberg to find favorable opportunities for \$21.3 billion portfolio
- Analyzed equity, investment-grade, and high-yield securities for largest investment fund in state
- Covered consumer staples, communications, and advertising industries
- Produced DCF valuations and credit default models to make buy, sell, and hold decisions
- Created Corporate Action Fund, outperforming Barclays US corporate bond index by +150 bps/yr

EXTRACURRICULAR ACTIVITIES

UKY Investment Banking Academy

Feb 2019 – Present

Co-Founder & Director of Curriculum

- Direct group of UK students interested in working in the investment banking industry
- Develop study resources covering investment banking technical skills and interview preparation

UKY Finance Society

Dec 2018 – Present

President

- Oversee 500+ members and coordinate Bloomberg Market Concepts, Capital IQ, and career preparation programs
- Recruit presenters for regular meetings and respond to emails from students interested in joining Finance Society
- Grow the Finance Society active member list by over 25% (125+ members)

Lewis Hall Council

Aug 2018 – Present

Chairman

- Manage the agenda for all Hall Council General Assembly and Board Meetings
- Organize weekly events in the residence hall to increase student engagement

ADDITIONAL INFORMATION

Modeling: M&A, LBO, DCF (Wall St. Prep), Comparables Analysis, Credit Default, Monte Carlo Simulations

Technical Skills: R, Python, Advanced Excel, Capital IQ, Factset, Bloomberg, and Quickbooks

Certifications: Bloomberg Market Concepts, FINRA SIE (studying)

Interests: Italian Cooking, Securities Analysis, Reading Biographies (Business Leaders), Forestry, Beta Alpha Psi

Peter Koutrodimos

860 Rickel Circle, Akron, OH 44333
(330)-907-0958 | peter.koutrodimos@uky.edu

EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance and B.S in Accounting; Minor in Economics

May 2022

- **Cumulative GPA: 4.0/4.0; ACT Composite: 34**
- **Honors:** National Merit Finalist, Dean's List All Semesters, Lewis Honors College
- **Scholarships:** Patterson Scholarship (Full Tuition + Housing Stipend)
- **Relevant Coursework:** Financial Accounting, Managerial Accounting, Microeconomics, Macroeconomics

EXTRACURRICULAR ACTIVITIES

University of Kentucky Chellgren Center

Lexington, KY

Research Fellow

Aug 2019 – Present

- Engage in Equity Research to discover if the stock was overvalued or undervalued using both qualitative and quantitative methods
- Assemble a poster showcasing the research to present at an Undergraduate Research Presentation

UK 101 Peer Instructor

Lexington, KY

Teaching Assistant

Aug 2019 – Oct 2019

- Co-taught university orientation class of 24 freshman throughout the Fall 2019 semester, focusing on adaptation to college life and skills necessary to succeed in college
- Coordinated and tailored lesson plans to best suit a class of all business students, including a panel of business professionals and a more advanced financial wellness lesson

University of Kentucky Community of Scholars

Lexington, KY

Peer Mentor

Aug 2019 – Present

- Mentor six students in the Honors College dorms and assist with the transition into college life
- Direct the move-in process to ensure efficient loading and unloading possessions

WORK EXPERIENCE

Lowe's Home Improvement

Akron, OH

Sales Associate

May 2019 – Aug 2019

- Service Star Award Winner for outstanding customer service, awarded based on independent positive feedback from customers
- Initiated the sale of outdoor power equipment, furniture, and accessories by approaching customers on the sales floor
- Resolved customer complaints in person and over the phone through effective communication and negotiation

ADDITIONAL INFORMATION

Technical Skills: Proficient in Excel, PowerPoint, and Word

Certifications & Training: Wall Street Prep Financial Statement and DCF Modeling Seminar, Bloomberg Market Concepts, Capital IQ

Memberships: Alpha Kappa Psi Professional Business Fraternity

Activities: Finance Society, Recreational Basketball

Interests: Professional and College Football/Basketball, American History, Cleveland Sports

Michael E. O'Brien

9394 Meriul Lane, Clarence, NY 14032
(609) 578-8481 | michael.obrien@uky.edu

EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance and B.S in Accounting; Minor in Business Analytics

May 2022

- **Cumulative GPA: 4.0/4.0**
- **Scholarships and Honors:** Doris S. Bailey Scholar, Bluegrass Spirit Scholarship (half-tuition), Dean's List
- **Chellgren Freshmen Program:** One of eight freshmen out of 3,800 business students selected for early career development and networking with industry professionals
- **Relevant Coursework:** Financial Accounting, Managerial Accounting, Microeconomics, Macroeconomics, Statistics, International Relations

WORK EXPERIENCE

BANK OF AKRON

Clarence, NY

Retail Banking Intern

June 2017 – Dec 2017

- Processed \$40,000 in cash daily and managed retail services such as deposits, withdrawals, and loan payments
- Increased branch revenue by cross-selling relevant products & services through over 100 daily interactions with customers
- Rotated through various departments to include Accounting, Commercial Lending, and Deposit Operations which resulted in an overall understanding of bank departments and how teller duties affected back office operations
- Adhered to strict policies and performed daily reconciliation activities and dual control functions to include balancing cash drawer, automated teller machine, and bank vault with attention to detail

BROOKFIELD COUNTRY CLUB

Clarence, NY

Pro Shop / Bag Room Attendant

May 2018 – Aug 2019

- Performed cashier duties and earned reputation for excellent customer service and managing accurate cash drawer
- Ascertained customer needs and recommended relevant products and apparel by maintaining thorough knowledge of pro shop merchandise
- Scheduled tee-times and ensured proper set-up for smooth execution of tournaments and events under strict deadlines and time constraints
- Selected to mentor and train new employees to ensure they received education and exposure to best practices on bag room attendant responsibilities and club policies

EXTRACURRICULAR ACTIVITIES

TOWN OF CLARENCE BASEBALL ASSOCIATION

Clarence, NY

Assistant Coach / Umpire

Mar 2014 – Jun 2018

- Mentored over 50 young players about the fundamentals involved in baseball by leading small groups
- Assisted coaches in the development of summer camp curriculums and tryout format

ADDITIONAL INFORMATION

Technical Skills: *Wall Street Prep* Financial Valuation and DCF Excel Modeling boot camp, Bloomberg Market Concepts Certified, Capital IQ, Microsoft Office Suite

Activities: Alpha Kappa Psi, Finance Society, American Legion Boys State of NY, Model UN

Interests: UK Basketball, Classic Rock, Collecting Baseball Autographs, Crosswords

Seth Rice

833 Meadowbrook Drive, Lexington, KY 40503
(859) 224-1299 | seth.a.rice@uky.edu

EDUCATION

University of Kentucky Lexington, KY
Bachelor of Science in Computer Science May 2022

- **Cumulative GPA: 3.72/4.0**
- **Scholarships:** Pelissier Finance Scholarship, Pink Oak Endowed and Academic Excellence Scholarship
- **Relevant Coursework:** Systems Programming, Algorithm Design & Analysis, Software Engineering Techniques, Computer Networking

EXTRACURRICULAR ACTIVITIES

Pelissier Scholarship Lexington, KY
Team Member May 2020

- One of 16 students chosen to spend a week in New York City with trips to 15+ Wall Street firms

WORK EXPERIENCE

University of Kentucky, Blazer Hall Lexington, KY
Technical Developer May 2019 – Aug 2019

- Worked in a group environment to redesign and populate the Department of Communication's website with Drupal8 and SQL while adhering to the department faculty's specific requests for new features, such as a rewrite of the internship page
- Responsible for finalizing a macOS Catalina image with custom software packages to be deployed to multiple computers in a University owned computer lab
- Enabled researchers by pulling important faculty data through Python scraping scripts to later be deployed in to the new Drupal8 website

Crave Systems Lexington, KY
Technician May 2018 – Aug 2018

- Provided professional knowledge, sales, and installation of audio, video, and network control to residential and commercial consumers by installing network devices, mounting TVs, hooking up speakers, wiring houses with fiber optics and troubleshooting technical problems for repeated clients
- Worked on the installation and programming of the network to an elaborate system of mounted TVs and speakers for a variety of reputable businesses across Lexington and Cincinnati

University of Kentucky, Margaret I. King Library Lexington, KY
Lab Consultant Jan 2018 - Present

- Responsible for monitoring over 40 Windows and over 20 iMac machines from malicious intent and direct software requests from students to supervisors
- Consistently troubleshoot computer hardware, software, printing and other technical issues that occur within the laboratory

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: Python, C, C++, HTML5, CSS3

Certifications & Training: Bloomberg Market Concepts, Capital IQ

Activities: Lexington Blood Drive

Interests: Computer System Design/Building, Literature, Coffee Roasting/Brewing

Scott Schoeffler

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Scott.schoeffler@uky.edu | (216) 469-0874

EDUCATION

University of Kentucky, Gatton College of Business and Economics Lexington, KY
B.B.A. in Finance and B.S. in Accounting May 2022

- **Cumulative GPA:** 3.84/4.00
- **Relevant Coursework:** Corporate Finance, Financial Accounting, Managerial Accounting, Intermediate Accounting, Technology for Business Solutions
- **Scholarships:** Bluegrass Spirit Scholarship, Carpenter Business Scholarship

LEADERSHIP AND INVOLVEMENT

Beta Theta Pi Fraternity Lexington, KY
President Oct 2019 – Present

- Assist in managing approximately \$125,000 which is allocated to various committees such as programming, brotherhood and philanthropy
- Elected by a 140-man organization to oversee and manage the strategic vision of the organization
- Position the organization as a partner in higher education by fostering relationships with the executive board, the chapter, key alumni, the university, and the greater Lexington community
- Regularly run meetings with the executive team or the chapter as a whole

Look Up to Cleveland Cleveland, OH
Student Member Sept 2017 – May 2018

- Completed a capstone project that laid out a plan for improving underutilized cities in the greater Cleveland area
- Led a small group of 7 students and came up with a budget for potential projects in the Slavic Village neighborhood
- Worked with ~ 40 students from various Cleveland area high schools with different ethnic, economic, and social backgrounds
- Only student from a 400-person high school to be selected for the program

WORK EXPERIENCE

NEO Flag Football & Baseball Mentor, OH
Referee/Umpire Apr 2017 – Present

- Officiate 7 games daily to maintain standards of play and to ensure that both teams' coaches and players observe game rules
- Interact with coaches through the course of a game to ensure fair calls were being made

Waterway Gas and Wash Aurora, OH
Line Associate Apr 2016 – May 2017

- Worked alongside 15 employees and set the record for most cars cleaned in a day with over 1,000 while also ensuring customer satisfaction

ADDITIONAL INFORMATION

Computer: Experience in Capital IQ, Microsoft Office, Python

Certification & Training: Bloomberg Market Concepts (BMC)

Interests: Financial Reading, Cleveland Sports, Boating, Communication and Information Technology Stocks, Traveling, Cooking

Joel L Sebastian

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EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance, B.S. in Accounting and Economics

May 2022

- **Cumulative GPA: 4.0/4.0**
- **Honors:** Lewis Honors College, Member of Phi Kappa Phi Honor Society
- **Scholarships:** Patterson Scholar (Full Ride National Merit Scholarship), Scott Roeth Scholarship (Total of \$20,000 awarded to one business student annually)
- **Relevant Coursework:** Corporate Finance, Financial Accounting, Managerial Accounting, Capital Investment Analysis, Business Statistics, Intermediate Accounting I and II

PROFESSIONAL EXPERIENCE

University of Kentucky-Gatton College of Business and Economics

Lexington, KY

Economics Teaching Assistant

Oct 2019 – Present

- Selected from all Economics majors based on academic excellence, work ethic, and communication skills
- Responsible for the education of 450 students in microeconomics
- Work directly with professor in grading assignments, organizing and analyzing large amounts of data, and developing course content

University of Kentucky, Lab for Economics and Accounting Proficiency

Lexington, KY

Economics Tutor

Aug 2019 – Present

- Offer peer tutoring services in Microeconomics and Macroeconomics to approximately 25 students every week
- Build important communication and conflict resolution skills through interactions with students struggling with concepts, professors, or general course materials.

EXTRACURRICULAR ACTIVITIES

University of Kentucky-Gatton College of Business and Economics

Lexington, KY

Gatton Ambassador

Apr 2019 – Present

- Represent the student body of the Gatton Business College to alumni, faculty, potential students, and all external partners through hosting events, recruiting, and developing connections with alumni and the local community
- Serve on the Finance and Data team with two other ambassadors in organizing and responsibly allocating our program's budget
- Serve as a program leader in hosting and organizing an event to teach local elementary and middle school students about the importance of business and basic financial literacy

ADDITIONAL INFORMATION

Technical Skills: Skilled in Java and STATA, Proficient in Excel and MS Office

Activities: Alpha Phi Omega (National Service Fraternity), Kentucky Math Team, Secretary of Finance Society

Interests: Stock Trading, Financial News, Soccer, Football

Brendan P. Simpson

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EDUCATION

University of Kentucky

B.B.A. in Finance and B.S. in Accounting
Minor in Business Analytics

Lexington, KY
May 2022

- **Cumulative GPA: 3.58/4.0**
- **Relevant Coursework:** Financial and Managerial Accounting, Intermediate Accounting, Corporate Finance

WORK EXPERIENCE

Snapp Development

Director of Marketing and Finance

Cleveland, Ohio

Feb 2016 – May 2018

- Co-founded the software development company which created numerous products centered around time management
- Created both subscription and licensing-based plans to monetize multiple products
- Managed four employees during planning and execution of marketing efforts

Wyrwas Aluminum Industries

Office Intern

Cleveland, Ohio

May 2019 – Aug 2019

- Completed price analysis which led to owner raising prices on multiple products by as much as 15 percent
- Transferred and organized paper records for over 200 unique parts and 300 unique orders on to Excel documents
- Quoted prices for current and prospective customers

Wyrwas Aluminum Industries

Rework Technician

Cleveland, Ohio

May 2019 – Aug 2019

- Completed work on parts before they were shipped out to clients
- Improved process by which rejected parts were inspected and organized
- Made deliveries to clients

Roundstone Insurance

2020 Summer Intern

Cleveland, Ohio

Jun 2020 – July 2020

- Will rotate through the company's Finance, Accounting, and Compliance departments
- Will assist the different departments in completing projects related to the company's clients
- Will provide an analysis of Roundstone with suggestions on how to improve its operations upon completion

EXTRACURRICULAR ACTIVITIES

University of Kentucky Entrepreneurship Club

Club Secretary

Lexington, KY

Jan 2019 – Present

- Manage and maintain the club's official documentation
- Aid the club president in planning discussion topics for all club meetings
- Contribute to the planning of future club activities and their execution

University of Kentucky Finance Society

VP of Marketing

Lexington, KY

Jan 2019 – Jan 2020

- Helped plan marketing efforts for society events
- Worked with president to create material for the organization on LinkedIn
- Developed tools to enhance membership benefits and experience

University of Kentucky Business Enterprise Living Learning Program

Peer Mentor

Lexington, KY

Jun 2019 – Present

- Act as a teaching assistant and help plan curriculum for UK 101 course
- Provide advice and guidance to students participating in the LLP
- Organize educational events outside of the classroom

Additional Information

Software: Excel, Certified in Bloomberg Market Concepts

Modeling: *Wall Street Prep* Financial Valuation and DCF Modeling seminar

Skills: Portfolio Management, Public Speaking, Entrepreneurship

Interests: Chess and History

Gabriela Torres-Winburn

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EDUCATION

University of Kentucky Lexington, KY
B.B.A in Marketing and B.S in Accounting May 2022

- **Cumulative GPA: 3.9/4.0**
- **Scholarships:** William C. Parker Scholarship, Blue Grass Scholarship
- **Relevant Coursework:** Financial Accounting, Managerial Accounting, Microeconomics, Macroeconomics, Corporation Finance

WORK EXPERIENCE

University of Kentucky, Office of Residence Life Lexington, KY
Resident Advisor Aug 2019 – Present

- Prepare risk management plans to ensure the safety of all residents
- Enforce the University of Kentucky’s student code of conduct
- Manage crises by implementing appropriate methods of confronting, documenting, following up with, and/or mediating any incidents that may affect the well-being of the community
- Organize monthly community gatherings and one-on-one meetings with thirty (30) residents to cultivate a sense of belonging

Vandalia Recreation Center Dayton, OH
Lifeguard, Swim Lesson Instructor Jun 2017 – Aug 2019

- Maintained constant surveillance of patrons in the facility and acted immediately and appropriately to emergency situations
- Instructed and evaluated students participating in swim lessons
- Submitted proper paperwork, including skill sheets and report cards, on time

EXTRACURRICULAR ACTIVITIES

University of Kentucky – Student Government Association Lexington, KY
Senator Mar 2019 – Present

- Serve on the operations and evaluations committee, approving all executive appointments and legislation
- Analyze legislation documents and rewriting the Constitution
- Serve as a funding sponsor for the UK Solar Cars student organization through a Senate Special Project

University of Kentucky – Finance Society Lexington, KY
Assistant Treasurer Jan 2020 – Present

- Work with the Treasurer to create and utilize an effective tracking system for dues of 125+ members
- Assist in collecting new member and unpaid dues

University of Kentucky Panhellenic Association Lexington, KY
Committee for Diversity and Inclusion Jan 2019 – Jan 2020

- Chosen from hundreds of candidates as the representative for the Alpha Delta Pi sorority
- Created events within the Panhellenic community that supported women with minority backgrounds
- Worked with women from thirteen (13) chapters to educate the thousands of Panhellenic women on the issues regarding discrimination and inaccessibility that our community faces

SKILLS, ACTIVITIES & INTERESTS

Certifications & Skills: Bloomberg Market Concepts, Intermediate in Spanish
Activities: University of Kentucky Alpha Delta Pi sorority, Accounting Club, Ronald McDonald House volunteer
Interests: Alternative music, art museums, traveling to Puerto Rico

Savina Williams

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EDUCATION

University of Kentucky, Gatton College of Business and Economics

Lexington, KY

B.S in Economics and B.A in International Studies

May 2022

- **Cumulative GPA:** 3.75/4.00
- **Scholarships and Honors:** Bluegrass Spirit Scholarship, Marguerite Pelissier Scholarship, Dean's List
- **Relevant Coursework:** Financial Accounting, Managerial Accounting, Microeconomics, Macroeconomics

WORK EXPERIENCE

Compliance Intern

Pittsburgh, PA

First National Bank

May 2019 – July 2019

- Provided editing assistance with new regulatory compliance plans to be implemented across the corporation
- Prepared documents regarding the state of compliance-based issues to be distributed to company executives
- Compiled and created over 45 Community Development and Demographic Reports for top managers

Chellgren Center Office Assistant

Lexington, KY

University of Kentucky

Sep 2019 – Present

- Compile and create weekly newsletter with opportunities for all students in Chellgren Fellowship Program
- Centralize scholarship information for students and faculty while providing administrative assistance

Administrative Intern

Pittsburgh, PA

Legend Financial Advisors

Jun 2016 – Aug 2016

- Provided administrative support for 30 employees through compiling articles pertaining to job efficiency
- Prepared relevant documents for distribution in the office and organized employee time allotment charts

LEADERSHIP EXPERIENCE

Kappa Alpha Theta

Lexington, KY

Facility Management Director

Apr 2019 – Present

- Organize and coordinate housing contracts for 85 total members and created system for house member selection
- Communicate with Nationals to oversee the standards of the construction of a new \$6M house
- Create and maintain website for house event communication across 290 members

INVOLVEMENT

Chellgren Fellowship Program

Lexington, KY

Active Member

Sep 2018 – Present

- Selected as 1 of 30 members based on academic achievements and interest in enrichment opportunities
- Attend etiquette seminars to enhance conversational skills, resumes, and interview abilities

Junior Panhellenic Council

Lexington, KY

Committee of Internal Affairs

Sep 2018 – May 2019

- Created and organized council events to establish trust and an open atmosphere between the members
- Planned and executed philanthropy event supporting Women's Education Funds

SKILLS, ACTIVITIES & INTERESTS

Languages: Intermediate in Spanish

Certifications & Training: Bloomberg Market Concepts, Capital IQ

Activities: Marketing Teaching Assistant, Intramural Soccer

Interests: Reading, Pittsburgh Sports, Yoga

Cooper Winrich

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(502) 657-9005 | Cooper.winrich@uky.edu

EDUCATION

University of Kentucky

B.B.A in Finance and B.S. in Accounting

Minor in Business Analytics and International Business

Lexington, KY

May 2022

- **Cumulative GPA:** 4.0/4.0

- **Scholarships:** Presidential Scholarship (Full tuition), Steinhauser Scholarship, Chellgren Fellow, AP Scholar with Distinction

WORK EXPERIENCE

Alliance Cost Containment

Business Development Intern

Louisville, KY

May 2019 – Aug 2019

- Researched Private Equity firms and their portfolio companies to recommend to potential clients
- Pitched and networked with potential Private Equity clients
- Worked in business development to expand the newly developed Private Equity branch

Access Ventures

Venture Capital Intern

Louisville, KY

May 2019 – Aug 2019

- Created a deal room to be integrated for future fundraising use at the firm
- Collaborated closely with the investment team to summarize previous investments, including reasoning for investment, investment details, and key details since investment

Broadtree Partners

Private Equity Intern

Louisville, KY

Oct 2019 – Present

- Source deals and vet investments
- Work side-by-side with partners on LBO modeling and expect to work independently on LBO modeling by the end of Spring 2020
- Conduct market research on determinants of potential investments

LEADERSHIP EXPERIENCE

University of Kentucky – Student Government Association (SGA)

Executive Director of Finance, Student Fee Allocation Committee Chairman

Lexington, KY

Apr 2019 – Present

- Selected to be the Executive Director of Finance to lead financial decisions of all directors in Student Government Association, organize and lead coordinators of the Finance division
- Write SGA's \$650k+ budget for year 2019 – 2020, establish and lead the Student Fee Allocation Committee, and oversee all financial transactions and decisions of SGA
- Propose and implement structural and procedural changes to achieve a projected \$80k cost savings for the fiscal year

University of Kentucky – Investment Banking Club

Founder & President

Lexington, KY

Apr 2019 – Present

- Coordinate the launch and management of the Investment Banking Club, including recruiting new members, leading the founding team of officers, and establish club standards and rules
- Prepare to host seminars for students chosen through an application, along with various speakers and study materials

ADDITIONAL INFORMATION

Software: Advanced Excel, Word, and PowerPoint; currently self-teaching Python

Prize: University Annual Stock Pitch Competition – Third Place Team (Spring 2019),
Louisville Marathon – Third Place in Age Group

Interests: Soccer, Rock Climbing, Boxing, Speech and Debate, Endurance Training (Marathons)

Jin Hong Zheng

101 Inverness Circle Princeton, KY 42445
(270) 601-0609 | jinhongzheng0@gmail.com

EDUCATION

University of Kentucky Lexington, KY
B.B.A in Finance and Economics Dec 2021
Minor in Business Analytics

- **Cumulative GPA: 4.00/4.00**
- **Relevant Coursework:** Corporate Finance, Financial Analysis, Capital Investment, Financial Decisions, Intermediate Accounting, Financial Accounting, Managerial Accounting, Intermediate Microeconomics, Macroeconomics, Statistical Methods and Motivations

PROFESSIONAL EXPERIENCE

Farmers Bank & Trust Company Princeton, KY
Summer Intern May 2019 – Present

- Provide help with credit analysis and examine potential loan borrowers based on loan repayment ability to meet the risk management requirements
- Organize data for financial tracking information for loans, and research documentations for perfection of liens in Excel

Farmers Bank & Trust Company Princeton, KY
Summer Intern May 2018 – Aug 2018

- Engaged in fundamental platform of banking and trust company including direct services, bookkeeping, and marketing activities with the community
- Provided financial transaction services to customers such as deposits, withdraws, payments, and issuing cashier checks and money orders
- Answered queries and assisted customers with account related issues

Princeton Finishing Princeton, KY
Production Jan 2017 – Jun 2017

- Operated machines to meet production needs and checking the product quality
- Organized inventory and products efficiently by transporting them from stations to stations

EXTRACURRICULAR ACTIVITIES

Finance Society Lexington, KY
Member Aug 2018 – Present

- Interact with guest speakers to discuss their finance careers and mentor students to persevere in a work environment

Business Living Learning Program Lexington, KY
Member Aug 2018 – May 2019

- Participated in numerous activities designed to enhance students' business professionalism. (i.e. visiting high level companies, meeting with key managers, and completing the leadership certification)

ADDITIONAL INFORMATION

Languages: Fluent in Mandarin

Skills: Proficient in Excel & PowerPoint, Sageworks, Capital IQ, Bloomberg Market Concepts

Modeling: Completed Wall Street Prep boot camp on Financial Valuation and DCF Excel Modeling

Interests: Basketball, Soccer, Football, Fitness

Participant Profiles



Drew Rodriguez

[Class] 2024

[Major] Finance

[Minor] International Business and Data Analytics

[Email] drewrod@outlook.com

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Ethan Tate

[Class] 2024

[Major] Accounting, Finance, and Computer Science

[Email] ethan.tate@uky.edu

[Resume] page 22

Xiomara Sukach

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EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance

May 2024

- **Cumulative GPA: 3.66/4.0**
- **Honors:** National Hispanic Honor Scholar, Lewis Honors College
- **Scholarships:** Patterson Scholarship (Full Tuition), Rotary International Junior Rotarian Scholarship, Houston Alumni Association Scholarship
- **Wall Street Scholars:** 1 of 23 students selected across campus for advanced finance curriculum and exclusive co-curricular career development opportunities
- **Social Entrepreneurship Scholars:** 1 of 34 students selected to pursue a curriculum option with a focus on Marketing, Management, and Entrepreneurship

WORK EXPERIENCE

JP Morgan

New York, NY

Incoming Summer Analyst – AHL Investment Banking Fellowship

June – July 2022

- Selected as a Fellow for the first AHL fellowship program, working in the investment banking group
- Learning the IB industry through mentoring, projects, and team assignments

VonLehman M&A Advisory

Lexington, KY

Wildcat Advisory Group Intern

Sep 2021 – Present

- Perform M&A case studies and aid senior bankers with live-deal tasks
- Develop marketing materials, perform market research, and work through the financial modeling process

Loft

Houston, TX

Sales Associate

July 2021 – Jan 2022

- Assisted customers, maintained a professional and well-functioning environment

EXTRACURRICULAR ACTIVITIES

University of Kentucky, Gatton Ambassadors

Lexington, KY

Finance and Data Officer

Jan 2017 – Apr 2017

- 1 of 25 students selected to represent the Gatton College of Business and Economics, serving the college as student leaders, hosting events for students, and offering tours of the college
- Officer in charge of finances, maintaining yearly budget, tracking event attendance, receipts, and purchases

Pelissier Scholar

Lexington, KY

Team Leader

February 2022 – May 2022

- 1 of 14 students selected across campus to receive the scholarship and participate in a week-long trip to New York
- Selected to be team lead, responsible for timeliness and maintaining expectations of the group

University of Kentucky Leadership Development Program

Lexington, KY

Member

Sep 2020 – May 2021

- 1 of 40 students selected across campus to work with campus leaders and peers to develop leadership and teamwork skills, as well as serve the campus community

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: Basic in Python, proficient in Excel, Powerpoint, and Word, BMC certification

Activities: Christian Student Fellowship, UK Latino Student Union

Interests: Public speaking, Kentucky Basketball, Fitness, Thrift Shopping

Sabin Bhattarai

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EDUCATION

University of Kentucky

Lexington, KY

Bachelor of Business Administration in Finance, Business Analytics Minor,

Dec 2023

Bachelor of Science in Accounting

- **Cumulative GPA: 3.938/4.0**

- **Scholarships & Honors:** University of Kentucky Provost Scholarship, Kentucky Educational Excellence Scholarship, Dean's List, AP Scholar with Honor
- **Pelissier Scholar:** 1 of 14 students selected across campus to receive the scholarship and participate in a week-long trip to Wall Street
- **Wall Street Scholar:** 1 of 23 students selected across campus for advanced finance curriculum and exclusive co-curricular career development activities
- **Goldman Sachs Diversity Virtual Insight Series:** 1 of 10,000 applicants accepted into a program designed to enhance networking, resume, and interview skills.
- **Relevant Coursework:** Financial Accounting, Managerial Accounting, Intermediate Accounting I, Corporation Finance, Introduction to Business Analytics, Microeconomics, Macroeconomics

PROFESSIONAL EXPERIENCE

Teachers' Retirement System Pension Fund (KY)

Frankfort, KY

Investment Analyst Intern for the In-House Credit Research Team

Jan 2021 – Present

- Conduct research on companies in the high yield and investment grade bond markets
- Perform thorough analysis of market history readings
- Utilize FactSet software for in-depth portfolio research

VonLehman M&A Advisory

Lexington, KY

Wildcat Advisory Group: Intern

Aug 2021 – Present

- Perform M&A case studies and aid senior bankers with live-deal tasks
- Develop marketing materials, perform market research, and work through the financial modeling process

JGD Eyebrow Threading & Beauty Salon

Lexington, KY

Marketing Advisor & Graphics Designer

June 2019 – Present

- Responsible for advertising strategy and placement. Developed a marketing and social media strategy resulting in an increase of annual net revenue by 28%
- Nurtured and grew a limited social media presence into a robust and comprehensive experience
- Solely designed all creative print marketing elements

LEADERSHIP & INVOLVEMENT

Finance Society

Lexington, KY

President

Jan 2022 – Present

Executive Vice President

Aug 2021 – Jan 2022

Executive Secretary

Dec 2020 – Aug 2021

- Network with executives in the professional business world to build a relationship with the organization and business school
- Delegate duties to board members and lead event committee planning. Liaising with prospective members.
- Rebranded the organization with first-ever underclassmen board of executives

Nepali Student Organization (UKY)

Lexington, KY

Member

Sep 2020 – Present

- Built a Network of fellow Nepali peers
- Maintained Nepali heritage by being involved in cultural events

SKILLS, ACTIVITIES & INTERESTS

Languages: Proficient in Nepali, English, & Hindi

Technical Skills: Basic in Python, Proficient in Excel, PowerPoint, Word, Tableau, Canva (Graphic Design)

Certifications & Training: Bloomberg Market Concepts, Wall Street Prep Financial & Valuation Modeling Course

Interests: Soccer, Guitar, Bollywood, FC Barcelona, Cooking, Volleyball

Aubrey DeKemper

524 Angliana Ave, Lexington, KY 40508
(270) 869-4104 | agde236@uky.edu

EDUCATION

University of Kentucky

Lexington, KY

B.S in Mathematics and B.S in Computer Science

Expected Graduation: May 2024

- **Cumulative GPA: 4.0/4.0**
- **Honors:** Lewis Honors College, Pelissier Scholars, Presidential Scholarship, Dean's List, J.C Eaves Scholarship
- **Relevant Coursework:** Calculus I-IV, Matrix Algebra, Intro to Probability, Intro to Computer Programming, Intro to Program Design/Problem Solving, Intro to Software Engineering Techniques

WORK EXPERIENCE

University of Kentucky, The Study

Lexington, KY

Calculus 3 Tutor

Aug 2021 – Present

- Extensive understanding of mathematical concepts and a strong ability to convey information to struggling undergraduate peers
- Lead group tutoring sessions for undergraduate students and filled their knowledge gaps with the use of probing questions and the Socratic Method

Dempewolf Ford

Henderson, KY

Filer

Jan 2019 – May 2019

- Filed repair orders and made sure documents were organized in correct folders
- Kept record of material filed and removed using logbooks and computers

LEADERSHIP EXPERIENCE

University of Kentucky, K Week

Lexington, KY

K Team Leader

Mar 2021 – Aug 2021

- Welcomed and facilitated group of 15 incoming freshmen to the University of Kentucky
- Updated students about events and answered the questions they had about the University of Kentucky

Henderson County High School, Y-Club

Henderson, KY

Vice President

Sep 2019 – Mar 2020

- Attended Kentucky Youth Association (KYA), a mock-Kentucky government conference, as a bill author and effectively communicated issues with Kentucky and their solutions in front of an audience of my peers
- Organized and led weekly meetings for 20+ students where I helped new members with their assigned projects (writing a bill, creating speeches, etc.)

Henderson County High School, Student Ambassador Program

Henderson, KY

Student Ambassador

Jan 2019 – May 2020

- Organized school events and freshman orientation for incoming freshman at Henderson County High School with a team of other ambassadors
- Represented my high school while attending school board meetings and rotary club meetings

SKILLS, CERTIFICATION, & INTERESTS

Technical Skills: Python, C++, Unix, Microsoft Office (PowerPoint, Word, Excel)

Certifications & Training: Bloomberg Market Concepts

Interests: Traveling, Reading, Journaling

Jane Durbin

2205 Barnwell Lane, Lexington, KY 40513
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EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance, Minor in Business Analytics, International Business

May 2024

- **Cumulative GPA: 3.90/4.00**
- **Scholarships:** Provost Scholarship, Committee of 101 Scholarship
- **Wall Street Scholars:** 1 of 23 students selected across campus for advanced finance curriculum and exclusive co-curricular career development activities
- **Honors:** University of Kentucky Dean's List
- **Pelissier Scholars:** One of 14 students selected to visit and network with investment banks, private equity firms, hedge funds, and investment management firms in New York

WORK EXPERIENCE

Corporate Finance Associates

Lexington, KY

Intern

Dec 2019 – Mar 2020

- Researched industry trends in the manufacturing, technology, and hospitality space while maintaining company database using applications such as Microsoft Excel
- Assisted investment bankers in client relations projects and marketing
- Assisted in production of deal related documents and due diligence efforts

Cyclebar Fritz Farm

Lexington, KY

Instructor

Jan 2021 – Current

- Anticipate customer needs and provided them with high-quality service while upholding brand standards and values to ensure customer satisfaction
- Organize, prepare, and teach 45–60-minute cycling classes for up to 52 participants that include choreography, performance metrics, strength, and other elements
- Work with new riders and sold memberships based on the customers lifestyle, goals, and budget

EXTRACURRICULAR ACTIVITIES

University of Kentucky Finance Society

Lexington, KY

Social Coordinator

Dec 2020 – Dec 2021

- Organized educational and social events for upwards of 100 members with catering, activities, and various accommodations
- Created agendas, calendars, and activities for members of the Finance Society

Alpha Delta Pi Sorority

Lexington, KY

Tabulations Committee

Aug 2020 – Current

- One of 5 Alpha Delta Pi members to be selected
- Worked in Excel to organize and pair potential new members with existing members during Primary Recruitment

University of Kentucky Danceblue

Lexington, KY

Volunteer

Aug 2020 – Current

- Obtain donations and sponsorships for the UK's 24-hour dance marathon benefiting the DanceBlue Kentucky Children's Hospital Hematology/Oncology Clinic

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: Proficient in Excel, PowerPoint, Word, Basic in Python

Certifications & Training: Bloomberg Market Concepts, *Wall Street Prep* Financial Modeling and Valuation (Oct 2020), Capital IQ

Interests: fitness, snow-skiing, health & wellness, SEC sports, traveling

Kruse Harned

1321 Camden Avenue Lexington, KY 40503
(270) 872-3338 | kruseharned@uky.edu

EDUCATION

University of Kentucky

B.S. in Biomedical Engineering & Minor in Business

Cumulative GPA: 4.0/4.0

Kentucky Governor's Scholar Presidential Scholarship

- Full in-state tuition

Pelissier Scholars Wall Street Experience

- One of 14 students selected to receive a scholarship visit and network with investment banks, private equity firms, hedge funds, and investment management firms on Wall Street

Relevant Coursework: Accelerated Composition and Communications II, Calculus I, Calculus II, Calculus III, and Calculus IV

Lexington, KY

Expected: May 2024

EXTRACURRICULAR ACTIVITIES

University of Kentucky - Biomedical Engineering Society

Team Member

- Selected to attend and participate in meetings and seminars working towards improving the Biomedical Engineering Major at the University of Kentucky

Governor Scholars Program

Governor Scholar

- One of few selected from a rigorous application process based off academics, community service, and character to attend a prestigious summer program for Kentucky's best and brightest

Hugh O'Brian Youth Leadership Program

Attendee

- One of few applicants that showed leadership qualities selected to attend a Leadership Program at Transylvania University to improve upon leadership skills and time management

WORK EXPERIENCE

Walgreen's Pharmacy

Certified Pharmacy Technician

- Performing daily duties of filling prescriptions, organizing the pharmacy, calling patients, and performing insurance tasks while providing excellent customer service

Freshie's Produce

CEO

- Created a small business delivering fresh produce around local neighborhoods on a lawn mower
- Implemented unique strategies to gain new customers and increase sales
- Managed finances to maximize cost to profit ratio

SKILLS, CERTIFICATIONS, & INTERESTS

Languages: Intermediate in Spanish

Technical Skills: MATLAB, Microsoft Office, 3D Printing, Computer Automated Design

Certifications & Training: Bloomberg Market Concepts, Capital IQ, *Wall Street Prep* Financial Modeling and Valuation (February 2022), Certified Pharmacy Technician (2021-Present), Certified Licensed Basketball Official (2019-Present)

Interests: Basketball, Calculus, Product Design, Marvel Cinematic Universe

Lexington, KY

June 2021 – Present

Danville, KY

June 2019 – July 2019

Lexington, KY

June 2017 – July 2017

Bardstown, KY

May 2014-Aug 2016

Lauren Jones

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(502) 909-7710 | lauren.jones@uky.edu

EDUCATION

University of Kentucky

B.B.A in Finance, Minor in International Business

Lexington, KY

Expected Graduation: May 2024

- **Cumulative GPA: 3.87/4.00**
- **Scholarships:** Presidential Scholarship (full tuition paid for four years)
- **Pelissier Scholar:** 1 of 14 students selected across campus to receive a scholarship and participate in a week-long trip to Wall Street
- **Wall Street Scholar:** 1 of 22 students selected across campus to participate in an advanced finance curriculum, technical training, and exclusive co-curriculum and career development opportunities

PROFESSIONAL EXPERIENCE

KKR & Co. Inc.

Incoming Real Estate Credit Summer Analyst

New York City, NY

June 2023 – August 2023

- Underwrite properties, perform market research, participate in deal presentation, and present recommendations to the investment committee
- Work on live deals through all stages of the deal process from origination to deal closing or work on the asset management of already closed deals

VonLehman M&A Advisory

Incoming Mergers & Acquisitions Intern

Fort Wright, KY

May 2022 – Aug 2022

- Evaluate, value, and execute M&A deals for companies between \$10M-\$100M revenue
- Work extensively in a team environment to close M&A transactions
- Selected as 1 of 2 interns among a group of 15 in the Wildcat Advisory Group

Department of Finance and Quantitative Methods, Gatton College of Business

Research Assistant

Lexington, KY

Jan 2022 – Present

- Assist with background research for curriculum development in real estate finance, new venture finance, and special projects on higher education finance, and academic research projects

VonLehman M&A Advisory

Wildcat Advisory Group Intern

Lexington, KY

Aug 2021 – Present

- Perform M&A case studies and aid senior bankers with live-deal tasks
- Develop marketing materials, perform market research, and work through the financial modeling process

Welvie, LLC

Consultant

Lexington, KY

Aug 2021 – Jan 2022

- Researched and identified potential strategic partnerships, assessed potential synergies/partnership opportunities within the industry, and reported directly to the Chief Strategy Officer

Kentucky Humane Society

Seasonal Kennel Attendant

Louisville, KY

May 2021 – Aug 2021

- Ensured the health and well-being of animals through a strict time schedule and daily feeding and cleaning procedures throughout the facility

LEADERSHIP EXPERIENCE

Endeavor Annual Publication Staff

Co-Editor-In-Chief, Executive Editor

Louisville, KY

Apr 2018 – Aug 2020

- Managed 17-33 staff members over two academic years, assigned coverage deadlines, developed layouts for a nationally recognized 150+ page annual
- Awarded 28 regional and national awards during the two years

Grehan Associates

Vice President of Creative

Lexington, KY

Dec 2020 – Jan 2022

- Provided graphic design, photography, and web design work for 10 clients partnered with the agency while delegating assignments to three creative assistants

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: Intermediate proficiency in Python 3, Adobe InDesign, Photoshop, and Capital IQ

Certifications & Training: Bloomberg Market Concepts, MOS, Wall Street Prep Valuation Modeling boot camp

Activities & Interests: Animal welfare, Volleyball, Flute, Hiking, Graphic design

Kennedy Klaber

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(859) 750-5858 | kennedy.klaber@uky.edu

EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance and B.S.B.A. in Accounting

May 2023

- **Cumulative GPA: 4.0/4.0**
- **Scholarships & Honors:** 2020 Steve Fricke Memorial Scholarship, University of Kentucky Provost Scholarship, Kentucky Education Excellence Scholarship, Dean's List
- **Wall Street Scholar:** 1 of 23 students selected across campus for advanced finance curriculum and exclusive co-curricular career development activities
- **Pelissier Scholar:** 1 of 14 students selected across campus to receive a scholarship and participate in a week-long trip to Wall Street

WORK EXPERIENCE

Bluegrass Business Advisors

Lexington, KY

Spring Intern

Jan 2022 – Present

- Compile lists of ~10 prospective buyers for small businesses for sale throughout Central Kentucky
- Create confidential business review decks and marketing materials to advertise business listings

VonLehman M&A Advisory

Fort Wright, KY

Intern – Wildcat Advisory Group

Aug 2021 – Present

- Perform M&A case studies and aid senior bankers with live-deal tasks
- Develop marketing materials, perform market research, and work through the financial modeling process
- Build a confidential information memorandum and compete in a sell-side pitch competition

Kroger

Lexington, KY

Cashier

Aug 2018 – Feb 2022

- Scanned groceries, monitored self-checkout, bagged groceries, pushed carts, helped customers to their cars, and cleaned to ensure brand loyalty
- Trained 6+ new employees and promoted from bagger to cashier

Ameriprise Financial

Crestview Hills, KY

Summer Intern – Fidant Wealth Partners

May 2021 – Aug 2021

- Identified \$27 million in underperforming brokerage accounts and successfully moved \$4 million to managed accounts
- Utilized Salesforce CRM to maintain central communication among coworkers
- Prepared meeting reports for client-advisor meetings to guarantee excellent client service

EXTRACURRICULAR ACTIVITIES

University of Kentucky Finance Society

Lexington, KY

Executive Vice President

Dec 2021 – Present

Vice President of Marketing

Aug 2020 – Dec 2021

- Attend meetings to network with finance professionals and to learn about finance careers
- Develop website, Instagram, and LinkedIn page to enhance the Finance Society's visibility
- Advertise meetings and events to recruit new members

University of Kentucky Accounting Club

Lexington, KY

Member

Feb 2021 – Present

- Attend monthly meetings to connect with peers and professionals in accounting

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: Basic in Python, Photoshop, InDesign, Illustrator, CRM, Tableau, Capital IQ

Certifications & Training: Wall Street Prep DCF & Financial Statement Modeling Seminar, Bloomberg Market Concepts, Microsoft Word Certified, Microsoft PowerPoint Certified (2019 Kentucky PowerPoint Champion), Microsoft Excel Certified, Microsoft Access Certified

Interests: Soccer, Traveling, Spikeball, Exercising, Hiking

Jacob Koets

1160 University Drive B450, Lexington, KY 40526
(574) 612-8333 | jacob.koets@uky.edu

EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance, Minors in Data Analytics and International Business

Expected: May 2024

- **Cumulative GPA: 4.0/4.0**
- **Honors:** Dean's List, Gatton College of Business Honor's Pathway
- **Scholarships:** National Merit Scholarship, Rugby Team Leadership Scholarship, Pelissier Scholars
- **Relevant Coursework:** Corporate Finance, Financial Accounting, Managerial Accounting, Data Analysis

EXTRACURRICULAR ACTIVITIES

University of Kentucky Rugby Team

Lexington, KY

Team Member

Aug 2020 – Present

- Successfully competed in walk-on tryouts upon arrival to UK
- Competing in 10 games per semester with 20 hours of practice and film study per week while taking a full course load
- Earned a leadership scholarship in Spring 2022, awarded for being a great example off the pitch

Campus Crusades for Christ

Lexington, KY

Student Member

Aug 2020 – Present

- Connect with other students at UK in a faith-oriented setting

University of Kentucky – Finance Society

Lexington, KY

Student Member

Aug 2021 – Jan 2022

- Attend networking events to meet professionals in finance and learn about various career paths in the industry
- Attend workshops to learn technical skills to be a competitive applicant to internships and jobs

WORK EXPERIENCE

Penn-Harris-Madison School Corporation

Mishawaka, IN

Maintenance Team Member/Special Projects Manager

Jun 2020 – Present

- Selected to lead the effort to gather district-wide blueprints, digitize and organize them, and redistribute the digital files to proper administration
- Working with school administration to implement a new security system across the school district

Hardware Plus

Osceola, IN

Sales Associate

Mar 2018 – Jan 2021

- Worked with customers through entire sales process to determine needs and the best solution for their needs
- Educated myself on hundreds of products to provide recommendations to hundreds of customers on a weekly basis

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: Capital IQ

Languages: Intermediate in Spanish

Certifications & Training: Bloomberg Market Concepts

Interests: SEC Football, Bodybuilding, Travel

Justin Meadows

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(217) 381-5340 | jimme247@uky.edu | <https://www.linkedin.com/in/justinmeadowsuky/>

EDUCATION

University of Kentucky

Lexington, KY

B.B.A. in Finance, International Business minor, Data Analytics minor

December 2023

- **Cumulative GPA: 3.7/4.0**
- **Wall Street Scholar:** 1 of 23 students selected across campus for advanced finance curriculum and exclusive co-curricular career development activities
- **Pelissier Scholar:** 1 of 14 students selected across campus to receive the scholarship and participate in a week-long trip to Wall Street
- **Scholarships & Honors:** Bluegrass Spirit Scholarship, Phi Gamma Delta Triple-A, Dean's List
- **Relevant Coursework:** Capital Investment and Financing Decisions, Investment Analysis, Financial & Managerial Accounting, Micro & Macroeconomics

WORK EXPERIENCE

VonLehman M&A Advisory

Lexington, KY

Wildcat Advisory Group: Intern

Aug 2021 – Dec 2021

- Perform M&A case studies and aid senior bankers with live-deal tasks
- Develop marketing materials, perform market research, and work through the financial modeling process

Edward Jones Headquarters

St. Louis, MO

Service Division Co-Op – Mutual Fund Team

July 2021 – Present

- Collaborate with financial advisors to provide accurate industry knowledge in real time
- Assisted on over 1900+ calls involving both systematic and real time trading within the mutual fund department

EXTRACURRICULAR ACTIVITIES

University of Kentucky Finance Society

Lexington, KY

Vice President of External Relations

Jan 2021 – Present

- Organize and lead in the outreach to guest speakers and other organizations
- Recognized out of 160+ members at Gatton Honors Day for my development in within the organization

Phi Gamma Delta Fraternity

Lexington, KY

Member

Jan 2021 – Present

- Raised over \$38,000 for the American Foundation for Suicide Prevention with our annual Out of the Darkness Walk, an effort that made it the 4th largest Campus Walk in the nation

University of Kentucky Business Enterprise LLP

Lexington, KY

Member

Aug 2020 – May 2021

- Participated in unique experiential learning activities such as networking events and lectures from business executives and local entrepreneurs

SKILLS, CERTIFICATES & INTERESTS

Technical: JMP, Capital IQ, Tableau, Excel, PowerPoint, Word

Certifications: Bloomberg Market Concepts, Wall Street Prep Financial & Valuation Modeling

Interests: English Premier League, Texas Hold'Em, Hiking, Travel

Hunter Miller

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(270) 465-1152 | hunter.miller@uky.edu

EDUCATION

University of Kentucky

B.B.A in Finance and B.S.A. in Accounting

Lexington, KY

May 2024

- **Cumulative GPA: 4.00/4.00**
- **Scholarships & Honors:** Provost Scholarship, Traut Scholarship, Dean's List
- **Pelissier Scholars:** 1 of 14 finance students chosen to visit financial firms in New York City during week-long visit to network with and learn from experienced finance professionals
- **Wall Street Scholars:** 1 of 22 freshman students selected across campus for advanced finance curriculum and exclusive co-curricular career development activities
- **Relevant Coursework:** Intermediate Accounting I & II, Technology for Business Solutions (Excel), Corporation Finance, Capital Investment and Financing Decisions, Investment Analysis

EMPLOYMENT

VonLehman M&A Advisory

Incoming: Mergers & Acquisitions Intern

Lexington, KY

May 2022 – Aug 2022

- Evaluate, value, and execute merger/acquisition deals for companies between \$10M-\$100M revenue
- Work extensively in a team environment to close M&A transactions utilizing strong interpersonal and financial modeling skills using software such as Excel and PowerPoint

VonLehman M&A Advisory

Wildcat Advisory Group Intern

Lexington, KY

Aug 2021 – Present

- Perform M&A case studies and aid senior bankers with live sell-side deal tasks
- Perform market research and develop marketing materials for potential middle market transactions
- Assist in the financial modeling and valuation process using Excel

Murakami Manufacturing U.S.

Accounting Intern

Campbellsville, KY

Jul 2019 – Jan 2022

- Managed department filing systems including document retention and storage for both A/P and A/R
- Assisted during quarterly and annual audits to efficiently process and translate relevant data for auditors
- Managed weekly review of journal entries, off-site company property costs, and exchange rates between YEN and USD using Excel

LEADERSHIP

University of Kentucky, Gatton College of Business and Economics

Teaching Assistant

Lexington, KY

Jan 2021 – Present

- Attend lecture twice per week to answer general questions and assist students while in class
- Host tutoring sessions assisting students in understanding class content and answering questions

University of Kentucky Finance Society

Treasurer

Lexington, KY

Jan 2020 – Present

- Manage all monetary transactions to support the 100+ member organization for 3 semesters
- Handle collection and processing of dues for members of the organization and purchases for events

ADDITIONAL INFORMATION

- **Skills:** Basic in Python; Proficient in Tableau, Capital IQ, Microsoft Excel, Word, and PowerPoint
- **Training:** Bloomberg Market Concepts (Nov. 2020), *Wall Street Prep* Financial Statement Analysis and DCF Valuation Excel Bootcamp (Nov. 2021)
- **Interests:** Cars, Traveling, History, Running

Matt Pullman

555 Hampton Lane, Roselle, IL 60172
(630) 814-9161 | mattpullman@uky.edu

EDUCATION

University of Kentucky

B.B.A. in Finance and B.S in Accounting

Lexington, KY

Expected Graduation: May 2024

- **Cumulative GPA: 3.8/4.0**
- **National Hispanic Recognition Program:** Top 2.5% of all Hispanic/Latino PSAT/NMSQT scores
- **Patterson Scholarship:** Full-tuition scholarship in recognition of merit scholar status
- **Wall Street Scholar:** 1 of 23 students selected across campus for advanced finance curriculum and exclusive co-curricular career development activities
- **Pelissier Scholar:** 1 of 14 students selected across campus to receive the scholarship and participate in a week-long trip to Wall Street
- **Relevant Coursework:** Financial Accounting, Managerial Accounting, Microeconomics, Macroeconomics, Business Analytics, Statistics, Corporate Finance, Investment Analysis

EXTRACURRICULAR ACTIVITIES

CFA Research Challenge Team

Team Member

Lexington, KY

Nov 2021 – Present

- One of five selected students to represent the University of Kentucky in equity research competition
- Conducted in-depth company analysis into how their environmental, social, and governance commitments and practices translate to valuation of the company

University of Kentucky Finance Society

Member

Lexington, KY

Sep 2021 – Present

- Attended weekly seminars to meet and network with industry professionals and develop literacy in different financial concepts

Phi Sigma Kappa Fraternity

Member

Lexington, KY

Sep 2021 – Present

- Assisted in the organization and maintenance social and philanthropic sponsored events that developed strong leadership and team-oriented qualities

WORK EXPERIENCE

Fortune Fish & Gourmet

AR Data Entry Analyst

Bensenville, IL

Dec 2021 – Jan 2022

- Oversaw and confirmed the transportation of over \$100,000 in gourmet foods and goods daily
- Journalized transactions to recognize sales and issue credits for various restaurant and grocery vendors through a Seasoft server

Elk Grove Village Park District, Rainbow Falls

Lifeguard

Elk Grove Village, IL

Jun 2019 – Apr 2020

- Responsible for the safety and conduct of 400+ patrons, infants, and senior citizens
- Participated in weekly intensive lifesaving training and protocols and achieved “exceeds expectations” ratings during general safety audits

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: Proficient in Microsoft Excel and PowerPoint, Basic in Python, Capital IQ

Certifications & Training: Bloomberg Market Concepts, Wall Street Prep Valuation Modeling

Activities: UK Polar Plunge, Delta Zeta’s Mr. UK Philanthropic Event – Contestant

Interests: Soccer, Camping, Chess, NBA

Drew Rodriguez

436 Oldham Avenue, Lexington, KY 40502
drewrod@outlook.com | 859.433.1532 | <https://www.linkedin.com/in/drewrodriguez/>

EDUCATION

University of Kentucky, Gatton College of Business - GPA: 3.67/4.0

Lexington, KY

Major: Bachelor of Business Administration, Finance

Expected Graduation: May 2024

Minor: International Business & Data Analytics

Scholarships/Awards:

- University of Kentucky Presidential Scholarship (full tuition), William C. Parker Diversity Scholarship (\$20,000)
- Developed Technology in 5-Week Startup & Pitch Deck Competition; Awarded \$5,000 Towards Commercialization
- Published Op-ed on COVID-19's Impact on Youth (Lexington Herald-Leader)

Relevant Coursework: Corporate Finance, Data Analysis, Financial/Managerial Accounting, Micro/Macroeconomics

EXPERIENCE

HGGC

Palo Alto, CA

Incoming Private Equity Summer Analyst

Starting June 2022

Kentucky Sports Industry Conference

Lexington, KY

Co-President & Founder

May 2021 – Present

- Identified the sports industry as an underleveraged market at the University of Kentucky and built a student-led talent pipeline organization (500 annual conference attendee target) to position us as the preeminent institution for future sports industry leaders
- Managed direct outreach with leaders from Nike, NBA, CBS Sports, etc. to discuss the need for talent in their industry and qualify our unique advantage to do so with the University's prestige in sports and reach in unique market segments
- Generated a budget and financing strategy (partners, grants, internal funding) to reach our revenue target of \$60,000
- Created a pitch deck and brand strategy to attract 10+ high profile speakers and meet our sponsor target of \$38,000
- Recruited and led a 7-person executive team and 30-person organization

Pasta Garage "Italian Café"

Lexington, KY

Catering & Events Director

July 2020 – September 2021

- Closed on \$125,000 in sales in one year between offsite events, private on-site events, and food trucks, a total increase of \$61,000 (87% YoY increase) since employment
- Developed positions and then recruited, onboarded, and managed team members, growing the team from 1 to 10+
- Built a website with direct booking that averaged 600 unique pageviews and 20 qualified prospects a month
- Established strategic relationships with key industry partners to develop passive leads
- Systemized event execution through manuals, training, and communication protocols for adjacent teams and the client
- Handled public relations for the restaurant by booking and interviewing for television, radio, print, and podcasts

LEADERSHIP & PROFESSIONAL DEVELOPMENT

SEO Career

New York, NY

SEO EDGE Participant (Alternative Investments & Investment Banking)

September 2020 – Present

- Received coaching and online instruction to achieve targeted interview, technical, and professional developmental goals
- Learned business fundamentals to compete successfully for internship opportunities
- Completed training and assessments focused on developing technical skills, institutional knowledge, and attention to detail

Markey DineAround (Markey Cancer Foundation)

Lexington, KY

Founder & Former Chair

September 2018 – February 2020

- Created and presented a fundraiser to the CEO of the Markey Cancer Foundation, an NCI-Designated Cancer Clinic, at age 17
- Recruited a high-profile committee, including the owner of Smiley Pete Publishing who donated \$20,000 in advertising
- Raised \$27,000+ by committing 15 restaurants to donate 25% of all day sales on Jan. 28, 2020
- Generated earned media including 4 television spots, 3 news articles, and thousands of impressions on social media

ADDITIONAL INFO

Computer: Capital IQ, Adobe Illustrator/Photoshop, Bloomberg Market Concepts, Microsoft PowerPoint/Excel

Interests: Chicago Cubs, Frank Sinatra, performance psychology, public speaking, reading autobiographies, volleyball

Languages: Spanish (Native), English (Native)

Other Awards: Distinguished Leader (Commerce Lexington), Young Adult in Philanthropy (Assoc. of Fundraising Professionals)

Ethan Tate

ethan.tate@uky.edu

1375 South Fourth St
Louisville, KY 40208
502.939.2960

EDUCATION

University of Kentucky – Gatton School of Business and the College of Engineering

Lexington, KY

Bachelor of Science: Accounting

Bachelor of Business Administration Finance

Class of 2024

Bachelor of Science: Computer Science

- ▶ Business GPA: 3.9; Engineering GPA: 3.9
- ▶ Pelissier Scholar
 - ❖ 1 of 14 students selected across campus to receive the scholarship and participate in a week-long trip to Wall Street
- ▶ 2020 Wall Street Scholar
 - ❖ 1 of 23 students selected for advanced finance curriculum and exclusive co-curricular career development activities
- ▶ Thomas W. Lester Scholarship Program: UK College of Engineering
 - ❖ Awarded for academic excellence in the college of engineering

WORK EXPERIENCE

VonLehman – CPA and Advisory firm with a M&A department

Louisville, KY

M&A analyst Intern

Oct 2021– Dec 2021

- ▶ Assistance with performing analysis on current companies looking to be acquired
- ▶ Creating LBO's, DCF's, and other models to explain the current situation and direction of the business
- ▶ Hands on experience working with mergers on the buyer and seller sides

ARGI – Financial Advising Company focused on Client Relations

Louisville, KY

Financial Planning and Operations Summer Intern

May 2021 – July 2021

- ▶ Created financial plans for 10 clients using data analysis tools to generate wealth for retirement
- ▶ Worked closely with management evaluating client experiences to ensure unmatched client service
- ▶ Led a team project to procure NetJets, a Berkshire Hathaway company, as a client
- ▶ Provided thorough analysis on monthly P&L reports with suggestions for improvement

Mathnasium – National math tutor center helping kids excel using math principles

Louisville, KY

Full-time Math tutor

Aug 2017 – Nov 2019

- ▶ Specialized in helping younger children who struggled to focus
- ▶ Distilled complex technical information down to a level for children to understand
- ▶ Communicated effectively with parents of children sharing strengths and areas for improvement

LEADERSHIP

The Forum at Brookside – Senior Living community enriching seniors and families

Louisville, KY

Founder of Tech Help Center at The Forum

Feb 2018 – Jan 2020

- ▶ Witnessed many biases in my community that favored people that were efficient in technology
- ▶ Applied knowledge of technology to educate the residents on foundational concepts
- ▶ Responsible for the safety and health of residents while assisting

Forgotten Louisville – Volunteer organization helping the homeless population in Louisville

Louisville, KY

Team Leader

Jan 2018 – Oct 2018

- ▶ Planned and Provided 6 team members the tools needed to collect, store, and deliver items
- ▶ Coordinated with other team leaders to determine priority items and logistics of distribution
- ▶ Welcomed and developed relationships with recipients of items from Forgotten Louisville

ADDITIONAL INFORMATION

Computer: Proficient in Python, Matlab, and emoney; Intermediate skills in C++, C, Orion, Hidden Levers, JAVA, BMC Certified, and Capital IQ

Interests: Strategic board games, traveling, athletic statistics, soccer, spikeball

Isabel Wolter

(502) 303-4891 | Isabel.Wolter@uky.edu
476 Rose Street Lexington, KY 40508

EDUCATION

University of Kentucky – Gatton College of Business & Economics **Lexington, KY**
B.B.A in Finance; Minors: International Business, Business Analytics *December 2023*

- **Cumulative GPA: 3.8/4.0**
- **Honors:** Pelissier Scholar, Wall Street Scholar, Dean's List
- **Scholarships:** Presidential Scholarship
- **Relevant Coursework:** Investment Analysis, Corporate Finance, Financial Accounting, Managerial Accounting, Business Analytics, Technology Business Solutions

WORK EXPERIENCE

Dean Dorton **Lexington, KY**
Business Valuation Intern *Jan 2020 – Present*

- Performed valuations ranging \$5M-\$1B using models such as discounted cash flow, capped earnings, and asset-based approaches for businesses, estates, and litigation cases
- Synthesized financial modeling, technical writing, and comparable analyses to refine client valuations
- Prepared final reports directly with senior consultants in accordance with AICPA standards

VonLehman M&A Advisory **Cincinnati, OH (Remote)**
Investment Banking Intern: Wildcat Advisory Group *Aug 2021 – Dec 2021*

- Performed industry analysis to aid in client acquisition for potential middle market transactions
- Assisted in financial modeling and valuation process using Excel and Capital IQ database

ZCAL, Inc. **Los Angeles, CA (Remote)**
Digital Marketing Intern *Jun 2021 – Aug 2021*

- Collaborated with founders to launch Gamma software and develop branding strategies to disrupt the market share of software as a service (SAAS) scheduling technology
- Developed digital content using business-to-business search engine optimization strategies and software

LEADERSHIP EXPERIENCE

Alpha Delta Pi **Lexington, KY**
Vice President of Marketing *Dec 2021- Present*

- Spearheaded strategic initiatives to promote positive content interaction by brand placement, catered media and blog posts, and a united international message to target over 15,000 social media followers, 2000 potential new members, and 275 active members
- Developed and implemented a project management system to lead over 25 marketing and recruitment officers to promote efficiency, brand outcomes, and team synergy

Pelissier Scholars, Gatton College **Lexington, KY**
Scholar *Feb 2022 – Present*

- One of fourteen students selected across campus to represent Gatton College in selective co-curricular career development activities and partake in advanced finance curriculum
- Engaged in exclusive networking with industry experts and fostered intellectual discussion surrounding Finance

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: Proficient in Microsoft Office, DCF valuation, Capital IQ; Basic in SQL, JMP pro, Tableau

Certifications & Training: Bloomberg Certificate, Values-Based Leadership, Microsoft Project Management

Activities: Finance Society, Ronald McDonald House volunteer, DanceBlue, Wildcat Ambassador

Interests: Travel, Technology, Music, History, Space Exploration, Entrepreneurship

Bryce Kushner

Bryce.kushner@uky.edu

(859) 229-1846

EDUCATION

University of Kentucky <i>Gatton College of Business and Economics</i>	Lexington, KY May 2020
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- Bachelor of Science in Computer Science **GPA: 4.0/4.0**
- Bachelor of Business Administration in Finance
- Member of Lewis Honors College
- Presidential Scholar, 4-year scholarship: \$62,000
- Team leader for Pelissier Scholars, ten students selected among 90+ applicants to visit Wall Street
- *Relevant Coursework:* Calculus III, Introduction to Software Engineering Techniques, Engineering Statistics, Financial Accounting, Microeconomics, Macroeconomics

WORK EXPERIENCE

Analyst Hub, Fintech Start-Up <i>Consultant</i>	New York, New York May 2017 – Sep 2017
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- Built a dynamic pro-forma excel model accompanied with an initial PowerPoint investor pitch deck
- Final model was used by the founder to complete \$1 million-dollar angel/seed round at a pre-money valuation of \$5 million

Renew Recovery <i>Data Analyst</i>	Georgetown, KY May 2017 – Sep 2017
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- Built analytics platform for a network of drug addiction clinics in KY, using excel
- Results of the analysis guided implementation of the company's final program and is being used to continue to track performance

Bluegrass Crossroads <i>Move Manager</i>	Lexington, KY Jun 2017 – Oct 2017
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University of Kentucky – Center for Applied Energy <i>Researcher</i>	Lexington, KY Jan 2015 – Apr 2016
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- Researched a relatively new method of desalination called Capacitive Deionization
- Conducted experiments to give the research team more data to identify most efficient method of operation

INVOLVEMENT

Finance Society Member	Dec 2017 – Present
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Radio Eye <i>Volunteer</i>	Lexington, KY Sep 2016 – Dec 2016
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- Recorded readings from books, magazines, and newspapers to be broadcasted on the radio for those who can't read

ADDITIONAL INFORMATION

Computer: High proficiency in C++, Excel, PowerPoint; Bloomberg Certified; Proficient in Java, R, Capital IQ

Investing: Self-managed portfolio with annual return of 20% over past 3 years

Interests: Racquetball, watching college football, traveling, poker

Noelle E. Cho

13049 Dekoven Drive, Fishers, IN 46037
317.820.6668 | chonoelle@gmail.com

EDUCATION

University of Kentucky Lexington, KY
B.S. in Business Economics and B.B.A. in Finance May 2020
Minor in International Business

- **GPA:** 3.74/4.0; **SAT:** 2350/2400 (Math: 760/800)
- **Honors:** 2016 National Merit Scholar, 2016 Patterson Scholar (UK academic merit scholarship, full-tuition and housing renewable for four years), 2018 Pelissier Scholar

Griffith University Queensland, Australia
Feb 2017– Jun 2017

- Foreign Exchange Program
- Studied Business Data Analysis and International Business courses

PROFESSIONAL EXPERIENCE

University of Kentucky Gatton College of Business and Economics Lexington, KY
Teaching Assistant, Department of Finance and Quantitative Methods Feb 2018 – Present

- Develop comprehensive guides on conducting equity research reports for finance independent study and equity analysis courses using Capital IQ, Morningstar, Value Line, and Argus.

Hope Physical Therapy, LLC Fishers, IN
Accounting and Administrative Intern Aug 2015 – Jun 2016

- Collected and analyzed company financial metrics (monthly sales revenue, patient retention rate) for impact on profitability and cost-reduction.
- Navigated QuickBooks accounting and Rent Manager property management software programs to record company financial data and customer transactions.

University of Kentucky International Center Lexington, KY
Education Abroad Peer Ambassador Intern Aug 2017 – Dec 2017

- Compiled Excel spreadsheets with data on 2,000+ attendees of 2017 Education Abroad Fall Fair.
- Presented at biweekly Education Abroad promotional events and info sessions for avg. 30 students.
- Collaborated on research team of 5 interns with goal of improving coherence of UK Abroad website.

Aramark Services Lexington, KY
Lead Student Worker, Starbucks Sep 2016 – Present

- Coach a team of 4-6 baristas to ensure interactions and product quality uphold corporate standards.
- Reduce expenses and improve waste control by evaluating revenue and adjusting pastry order pars.

SKILLS, ACTIVITIES & INTERESTS

Languages: Conversational in Korean

Certifications: Bloomberg Market Concepts, Wall Street Prep Excel Crash Course, Wall Street Prep M&A and LBO Modeling Seminar

Technical Skills: Capital IQ, QuickBooks, Rent Manager

Membership: Finance Society, Economics Society, Korean Student Association

Interests: Summer Volunteer Work in Indonesia, BODYPUMP Group Barbell Training, Food Travel in South Korea

Caroline Corley

2763 Long Grove Drive, Marietta, GA 30062

678.982.8995

caroline.corley97@gmail.com

EDUCATION

University of Kentucky

Lexington, KY

Gatton College of Business and Economics

May 2020

- Bachelor of Business Administration: Finance and Management
- International Business Minor

Cumulative GPA: 3.6/4.0

Global Scholars Pathway

- One of 25 students selected to take specialized classes on international business, culture, and leadership abroad

Marguerite Pelissier Scholar, Department of Finance & Quantitative Methods

- One of ten students chosen to attend week-long trip to New York City during May 2018

WORK EXPERIENCE

Federal Deposit Insurance Corporation

Columbia, SC

Pathways Intern

May 2018

- Will work on teams with experienced FDIC employees to assess risk as well as provide on-location bank examinations

Gatton College of Business & Economics, Dean's Office

Lexington, KY

Business Assistant

Jan 2017 — Present

- Track and audit payroll in Excel for the 68 Teachers' Assistants in the Gatton College
- Manage over 300 credit card reports and correctly organize all expenses using high attention to detail
- Proactively assist on reconciliation statements for the college's spending

Oli and Ve

Roswell, GA

Education and Customer Service

May 2014 — Present

- Provide customer service while selling ultra-premium olive oil and vinegar
- Educate clientele on our products as well as helping in the decision process on what product is best for them

Bell Tower Book

Lexington, KY

Sales Representative

Aug 2016 — Jan 2017

- Marketed to students on UK's campus and informed them on the benefits of selling textbooks at the end of the semester
- Successfully managed and organized over \$3,000 of transactions

LEADERSHIP

Gatton Honors Council Representative

Jan 2018 — Jan 2019

Forte College Business Leadership Conference

April 6th, 2018

Kappa Alpha Theta Sorority

Chief Financial Officer

Oct 2017 — Present

- Created a \$1.2 M budget that benefits the chapter and provides for community and campus efforts
- Headed multiple committees such as Finance, Risk Management, and Housing to reassure members are properly represented
- Managed online accounting software to bill 300 + members as well as payroll for staff of 12 employees

Financial Assistant

Oct 2016 — Oct 2017

- Incorporated Excel, PowerPoint, Word, and Outlook to respond to 309 members quickly and effectively
- Maintained a flexible and adaptable schedule to prioritize the chapter's changing business needs
- Exercised avid communication skills to educate the members on financial responsibility and resolve discrepancies in bills

ADDITIONAL INFORMATION

Modeling: Completed Wall Street Prep Financial Modeling and Valuation Seminar

Computer: Experience in Excel, Bloomberg, Capital IQ, and PowerPoint; proficient in Adobe

Interests: Investing, Golfing, Real Estate, Fashion, and Reading

J. Grant Deaton

238 Forest Park
Lexington, KY 40503

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(317) 525-4557

EDUCATION

University of Kentucky – Gatton College of Business & Economics Lexington, KY
Bachelor of Business Administration in Finance May 2020
Bachelor of Science in Accounting

- Cumulative GPA: 3.88/4.0
- Accounting GPA: 4.0/4.0

University of Kentucky – Stock Pitch Competition Lexington, KY
Team Member Feb 2018 – Mar 2018

- Analyze stocks with different valuation methods to uncover undervalued opportunities in the market
- Work strategically with teammates to create a presentation to present to a panel of judges

University of Kentucky – Pelissier Scholar

- One of 10 students selected from 90+ applicants to visit Wall Street

WORK EXPERIENCE

Hilliard Lyons Lexington, KY
Financial Consultant Intern May 2018 – Jun 2018

- Completed fundamental analysis on a multitude of Stocks, Bonds, and ETFs as well as built portfolios for specific investment objectives
- Presented to management my work on portfolio analysis and fundamental research
- Utilized data and analytics to develop a deeper understanding of specific companies and market trends

LEADERSHIP

Interfraternity Council Lexington, KY
Vice President of Finance Nov 2017 – Present

- Manage a \$110,000 budget of IFC funds for the semester as well as bill, receive, disburse, and keep an accurate account of IFC funds
- Produce financial reports on IFC accounts for the 23 fraternities on campus

Beta Theta Pi Lexington, KY
Financial Accountability Officer Nov 2017 – Present

- Create financial reports regarding the budget of the fraternity, including expenditures and income from dues
- Organize and create spreadsheets of financial data to maintain accountability of incoming and outgoing funds for the 150-member chapter
- Responsible for tracking every member of the chapter and ensuring payments in a timely manner

Beta Theta Pi Lexington, KY
Bring It On, Director of Operations Feb 2017 – Oct 2017

- Managed operations for the chapter's philanthropy event in Memorial Coliseum that reached and achieved fundraising goal of \$30,000

ADDITIONAL INFORMATION

Skills: Proficient in Excel, Bloomberg, and Capital IQ

Training: Bloomberg Certified

Service: 75 hours of community service at Miracle League, God's Pantry, and Red Shoe Crew

Interests: Baseball, Golf and Reading

Sarah El Rahmany

2006 Clearwater Way
2246237768 | sarah.elrahmany@uky.edu

EDUCATION

University of Kentucky

Bachelor of Business Administration in Finance
Minor in Biology

Lexington, Kentucky

Expected Graduation: May 2020

- **Cumulative GPA:** 3.67 / 4.00
- **Honors:** William C. Parker Scholarship (\$60,000), Lewis Honors College, Pelissier Finance Scholarship
- **Relevant Coursework:** Financial Accounting, Principles of Microeconomics I, Organic Chemistry I and II, Statistics, Genetics, Anatomy

WORK EXPERIENCE

University of Kentucky General Chemistry II Workshop

Undergraduate Instructional Assistant

Lexington, Kentucky

August 2017 – Current

- Served as an instructor for General Chemistry II recitation and prepared lesson plans and practice problems
- Selected for the position among 200 applicants through multiple rounds of interviews based on academic performance, initiative, demonstration of leadership skills
- Improve average class exam scores of students from a C to a B by coaching throughout the semester

University of Kentucky General Chemistry and Organic Chemistry

Private Tutor

Lexington, Kentucky

August 2016 – Current

- Served as a private tutor for the University of Kentucky Community for students of all majors
- Prepared schedule and met with several students on a rotation, most students twice a week

LEADERSHIP EXPERIENCE

Kappa Kappa Gamma Sorority

Academics Chair, Recruitment Coordinator

Lexington, Kentucky

August 2017 – Current

- Held an average of 10 study hours per week and kept track of study hours grades, and exam scores for 250+ members
- Participated in planning a recruitment event for 1,000+ potential new members
- Organized conferences weekly with members and presented ideas in whole-sorority meetings

Phi Delta Epsilon Pre-Professional Fraternity

Recruitment Chair

Lexington, Kentucky

December 2016 – December 2017

- Planned and held recruitment events for 500+ potential new members, including planning guest speakers
- Served as the head of interviewing committee, which interviewed 200+ potential new members

SKILLS & INTERESTS

Certifications: Bloomberg Market Concepts

Software: Capital IQ, Excel, PowerPoint, Photoshop

Activities: Student Government Association, Interprofessional Healthcare Living Learning Program

Interests: Tennis, Basketball

Andrew D. Flood

3515 Reeves Drive | Fort Wright, KY 41017
859.835.8770 | andrew.flood@uky.edu

EDUCATION

University of Kentucky, Gatton College of Business and Economics

Lexington, KY

Bachelor of Business Administration in Finance

May 2020

Bachelor of Science in Accounting

Cumulative GPA: 4.0/4.0

Minor in Economics

- **Scholarships:** Provost Scholarship, KEES Scholarship, Pelissier Finance Scholarship (awarded to 10 finance students in the Gatton College)

Gatton Study Abroad Program

Sydney, Australia

Student

Summer 2018

- Will travel with 20 students to Australia with two University of Kentucky professors to study sports economics and sports marketing from an international perspective

WORK & LEADERSHIP EXPERIENCE

Broadview Financial

Cincinnati, OH

Advising Intern

May 2017 – January 2018

- Shadowed client meetings to gain a deeper understanding of the Broadview portfolio and financial services industry
- Researched existing and innovative investment options to better serve Broadview clients
- Learned how to develop and execute a fully-functional financial plan
- Collaborated with executives to assist in day-to-day operations

Divinity Group Advisors

Fort Mitchell, KY

Advising and Marketing Intern

May 2016 – January 2017

- Developed and executed a new social media marketing campaign aimed at retaining and gaining new business in the northern Kentucky area
- Studied health and life insurance with the goal to become a licensed agent in the future
- Worked closely with management on financial advising cases across a broad portfolio of clients
- Oversaw a variety of social media accounts and helped increase post interaction on company accounts by over 800%

Sigma Chi Fraternity

Lexington, KY

Treasurer

August 2017 – April 2018

- Peer-elected by a 90+ chapter to collect and safeguard all funds due to the chapter and provide monthly reports to Sigma Chi Headquarters
- Constructed a \$150,000 budget and expense report
- Positioned the chapter to be debt-free to the University for the first time since 2002

SKILLS, ACTIVITIES & INTERESTS

Computer: Experience in Capital IQ, Excel, and PowerPoint

Certifications & Training: Bloomberg Market Concepts

Interests: Golf, Basketball, Investing, Reading, Politics, Real Estate, Cincinnati Sports

Jada Green

524 Angliana Ave Apt 3220, Lexington, KY
(618) 980-9533 | jadagreen0724@gmail.com

EDUCATION

University of Kentucky Lexington, KY
Bachelor of Business Administration in Finance and Economics May 2020
Minor in Arabic and Islamic Studies **Cumulative GPA: 4.0/4.0**

- **Honors:** William C. Parker Diversity Scholarship, Chellgren Fellowship, Dean's List, Pelissier Scholar
- **Relevant Coursework:** Managerial Accounting, Microeconomics, Macroeconomics, Statistical Computing, Intermediate Financial Accounting

Independent Study on Equity Research Lexington, KY
Student Jan 2018 – Present

- Perform discounted cash flow analysis to value three firms' cash flows and operations and make investment recommendations
- Develop a variant view regarding a public company based on research
- Present analysis and recommendation to a panel of professors and judges

WORK & LEADERSHIP EXPERIENCE

Management Leadership for Tomorrow (MLT) Washington, DC
Career Prep Fellow May 2018 – Present

- Selected as one of 350 for an 18-month professional development program for high-achieving diverse talent
- Complete business case studies and projects to hone analytical, quantitative and communication skills
- Participate in four professional development conferences hosted by industry leaders, such as Deloitte, Google, Goldman Sachs, Procter & Gamble and Target

University of Kentucky, Office of the Provost Lexington, KY
Intern Feb 2018 – Present

- Analyzed gross and individual tuition across 19 colleges in the University of Kentucky, using discounted cash flow to assess the value of tuition for students
- Balanced the general ledger for the Provost and Associate Provost of the University

Courtyard by Marriott Lexington, KY
Front Desk Associate Sep 2017 – Present

- Audited hundreds of guest transactions nightly and provided general office support in compliance with FERPA
- Consolidated guest ledger and forecasted future selling price points, leading to a 5-10% increase in revenue the following month

Student Activities Board Lexington, KY
Chair of Market Research Aug 2017 – Present

- Created surveys to gather data and interpret information related to the interest of on campus activities for students, faculty, and the Lexington community

VOLUNTEER EXPERIENCE

Habitat for Humanity Lexington, KY
Public Relations Officer Oct 2016 – Present

- Planned and carried out multiple fundraisers for the Habitat for Humanity Lexington organization
- Managed four online social media platforms daily as well as created publicity through three large scale events

SKILLS, ACTIVITIES & INTERESTS

Languages: Conversational in Spanish and Arabic

Certifications & Training: Bloomberg Market Concepts, Capital IQ, Regression Analysis

Activities: Club Volleyball, National Association of Black Accountants, Feminist Alliance

Interests: Volleyball, History, Calculus, Foreign Cultures

NICHOLAS HARKER

5383 North Shore Pl.
Mason, OH 45040

nick.harker@uky.edu

513.262.4305

EDUCATION

University of Kentucky

Gatton College of Business and Economics

B.B.A in Finance & B.S in Accounting

Lexington, KY

May 2020

Cumulative GPA: 3.86/4.00

- Dean's List all semesters and a member of Finance Society
- Relevant Coursework: Financial Accounting, Managerial Accounting, Microeconomics, Macroeconomics, Statistical Methods & Motivations

University of Kentucky – Pelissier Scholar

Lexington, KY

- One of 10 students chosen out of 90+ applicants to visit Wall Street firms

WORK EXPERIENCE

Touchstone Investments

Product Management & Research Summer Intern

Cincinnati, OH

May 2018 – August 2018

- Analyze and suggest enhancements for External Wholesalers Interactions with Strategy Specialist
- Document and perform complex fund processes for competitive fund research
- Use different software generating outputs to support on-going investment due diligence efforts
- Collect macroeconomic data and analysis to support Touchstone's investment Theme Book

Positiveprocess.org

Vice President

Cincinnati, OH

December 2017 – Current

- Build financial statements for each period end to better understand and improve the direction of the company
- Budget over \$1,265 donated to the American Cancer Society based on the total dollar amount of T-shirts sold
- Build a website through a template based platform

LEADERSHIP

University of Kentucky – Stock Pitch Competition

Team Member

Lexington, KY

February 2018 – March 2018

- Analyze stocks with different valuation methods to discover potential equity opportunities
- Work strategically with group members to organize a presentation for a panel of judges

Beta Theta Pi Fraternity

Chair of Social Relations

Lexington, KY

January 2018 – Current

- Manage 3-6 events each semester with varying budgets of up to \$3,000 each
- Lead a team of 6 with the goal of organizing and promoting relationships with other fraternities and sororities at the University of Kentucky
- Develop an itinerary and risk management plan for events with over 300 hundred attendees

Bluegrass Miracle League

Team Leader

Lexington, KY

September 2016 – October 2016

- Led a group of 12 students to help benefit children with special needs in the Lexington area
- Coordinated with Bluegrass Miracle League to allow the group of students to volunteer 4 times a month

ADDITIONAL INFORMATION

Training: Bloomberg Market Concepts

Computer: Proficient in Excel, Bloomberg, and Capital IQ

Interests: Baseball, Movies, and Reading

CONNOR N. MCKEE

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EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance and B.S in Accounting

May 2020

Minor in International Business

- **Cumulative GPA: 4.0/4.0**
- Scholarships: William C. Parker Diversity Scholarship (\$60,000 over 4 years), Provost Scholarship (\$6,000 over 4 years awarded to Kentucky Governor's Scholars)
- Pelissier Scholar: 1 of 10 students selected from 90+ applicants to receive a \$2,000 scholarship and participate in an 8-day trip to visit Wall Street
- Global Scholars Program: 1 of 30 students selected for a leadership team that takes business classes as a cohort and promotes an understanding of cultural differences while preparing students to study abroad

EXTRACURRICULAR ACTIVITIES

Beta Theta Pi Fraternity

Community Service Chair

Jan 2018 – Present

- Manage and coordinate all community service projects among 160 members often at God's Food Pantry

Financial Educator

Jan 2018 – Present

- Teach financial management skills to a 9-member pledge class as well as 160 active members

University of Kentucky Stock Pitch Competition

Participant

Jan 2018 – Present

- Create and make a recommendation to buy undervalued Martin Marietta stock through valuation modeling and statistical analysis

University of Kentucky Finance Society

Active Member

Aug 2017 – Present

- Attend weekly meetings, network with accomplished alumni, and recruit new members

Kentucky Opry Music Theater

Active Member

Jan 2009 – Aug 2016

- Classically trained in violin since age 3 (Suzuki method) and performed at weddings and other events
- Opened for various music artists such as Josh Turner, The Oak Ridge Boys, Roy Clark, and Ray Stevens

PROFESSIONAL EXPERIENCE

Xtreme Detailing and Landscaping

Symsonia, KY

Financial Manager and Owner

Nov 2017 – Present

- Averaged annual sales of \$7,000 with a profit margin of 72%
- Submitted bids for jobs, managed expenses, and paid 3 employees
- Detailed vehicles, mowed lawns, mulched, and landscaped ~ 5-20 hours per week according to season

ADDITIONAL INFORMATION

Modeling: Financial Modeling and Valuation, M&A, and LBO modeling

Software: Proficient in Bloomberg, Capital IQ, Excel, Word, and Powerpoint

Interests: Fitness, Wake Surfing, Slalom Skiing, Traveling, Sports

Drew Rosenzweig

3 Greenbriar Lane, Dix Hills, NY 11746 | (631) 944-2461 | dro249@uky.edu

EDUCATION

University of Kentucky, Gatton College of Business and Economics Lexington, KY
Bachelor of Business Administration in Finance and Marketing May 2020

- **Cumulative GPA:** 3.8/4.0
- **Total Scholarships:** \$29,500/year
- Chellgren Fellowship – 1 of only 60 sophomores across UK selected to participate in academic research in the prestigious Chellgren research program, with a strong focus on equity research
- Relevant Coursework: Corporate Finance, Financial Accounting, Managerial Accounting, Business Excel

WORK EXPERIENCE

Berkshire Hills Eisenberg Camps Copake, NY
Assistant Athletic Director Jun 2015 – Aug 2017

- Prepared unique activities for 200 campers while providing sports options for campers
- Utilized Excel spreadsheets to create equal opportunity of playtime for 200 campers during contests

501 Auctions New York, NY
Event Staff Sep 2015 – May 2016

- Registered, enrolled, and assisted 250+ clients for in-person, mobile and online bidding opportunities
- Encouraged a total of 300 attendees to bid against one another in a friendly, charitable atmosphere
- Ensured optimal speed and efficiency of the bidding systems

INVOLVEMENT AND LEADERSHIP

Phi Delta Theta Fraternity Lexington, KY
Founder Nov 2016 – Present

- Reestablished the Kentucky Epsilon Chapter of Phi Delta Theta Fraternity with 46 other students to create a sense of brotherhood and community for hardworking and self-driven individuals

Kentucky Hillel Lexington, KY
Treasurer Aug 2017 – Present

- Managed a monthly budget of ~\$1,500 using Excel to fund campus-wide events of the organization

Gatton Ambassador Lexington, KY
Member Aug 2017 – Present

- Helped to recruit ~ 200 prospective students to the Gatton College of Business and Economics

Wildcat Ambassador Lexington, KY
Representative Aug 2016 – Present

- Assisted 500 prospective students and families with check in/registration at the university
- Spoke regularly on student panels to inform prospective students about opportunities at UK

COMMUNITY SERVICE

PinkTie.org/PinkTie 1000
Volunteer May 2014 – Present

- Organized, executed, and oversaw a charitable event attended by over 2,500 business professionals networking for a cure to cancer, where we raised over \$400,000 in one evening

ADDITIONAL INFORMATION

Modeling: Wall Street Prep Financial Modeling & Valuation seminar (Oct 2017)

Software: Proficient in Word, Excel, PowerPoint, and Capital IQ

Certifications: Bloomberg Market Concepts

EDUCATION

University of Kentucky – Gatton College of Business & Economics

Bachelor of Business Administration: Finance Major, Economics Minor

Bachelor of Science: Accounting Major

Lexington, KY

Class of 2018

- Cumulative GPA: 3.88/4.00
- Relevant Coursework: Financial Analysis & Portfolio Management Practicum, Financial Modeling, Capital Investments & Financing Decisions, Investment Analysis, Financial Accounting I & II, Tax Accounting

WORK EXPERIENCE

Gatton College of Business' Equity Portfolio

Chief Compliance Officer

Lexington, KY

Jan 2017 – Present

- Nominated as 1 of 6 students enrolled in FIN 485 Investment Analysis & Portfolio Management Practicum
- Responsible for managing 3 equity portfolios with cumulative value exceeding \$2.5 million
- Monitored compliance of each portfolio in accordance with Tennessee Valley Association
- Computed all trade ticket orders ensuring transaction would not violate compliance
- Constructed stock pitch and class unanimously voted in 2.5% position

University of Kentucky

Finance Teaching Assistant

Lexington, KY

Aug 2016 – Present

- Selected by course instructor among 450+ students based off high performance in the course
- Responsible for holding office hours four times a week to tutor students on course material
- Aid in proctoring common hour and makeup exams and responding to TA email account

HomeLink Corporation

Finance and Accounting Summer Intern

East Dundee, IL

May 2016 – Aug 2016

- Constructed short-term invoices using QuickBooks and billed corresponding adjusters
- Delegated full responsibility over short-term claims by the Director of Finance
- Accelerated SCGC project's efficiency by 200% through invoicing extensive folios and identifying errors
- Saved the company a conservative \$50,000 by disputing billing errors with hotel general managers
- Reconciled credit card statements of 200+ pages and investigated missing charges exceeding \$1,000
- Trained full-time hire and transferred over all my responsibilities prior to the end of my internship

LEADERSHIP

Finance Society

Corresponding Secretary

Lexington, KY

Apr 2017 – Present

- Communicate to members via email the logistics of weekly meetings and available job postings or events

Alpha Delta Pi Sorority

Guard

Lexington, KY

Nov 2015 – Nov 2016

- Elected by 300+ members to serve as Sergeant-at-Arms for meetings and act as chapter's authority on ritual
- Educated entire chapter on initiation process and founded 12-person committee
- Implemented 3 day off-campus initiation and cut duration in half by running 2 ceremonies simultaneously

Pan-Hellenic Council

Recruitment Counselor

Lexington, KY

May 2016 – Aug 2016

- Selected amongst 500+ applicants to serve as disaffiliated Greek mentor for formal sorority recruitment
- Responsible for leading 13 women and navigating all participants around campus in a punctual manner

ADDITIONAL INFORMATION

Modeling: Completed Wall Street Prep Financial Valuation & Excel Modeling

Computer: Proficient in Excel, PowerPoint, QuickBooks, and Bloomberg Certified

Andrew Buskill

11901 State Route 1389
Lewisport, KY 42351

andrew.buskill@uky.edu

270.993.5021

EDUCATION

University of Kentucky

Major in Accounting and Finance; Minor in International Business

Lexington, KY

Class of 2020

- Cumulative GPA: 4.0/4.0
- Dean's List for all semesters taken
- Relevant Coursework: Basic Accounting, Basic Micro-Economics, Basic Macro-Economics, Leadership Application

WORK EXPERIENCE

Lawn Care Service

Self-employed

Owensboro, KY

April 2015 – Nov 2015

- Cleaned and swept steps and sidewalks for three households
- Transported equipment
- Mowed and weeded around property grounds
- Marketed business service by advertising on social media and making flyers
- Determined budget of business

Boardwalk Pipeline Partners LLP Shadowing

Shadow Experience

Houston, TX

June 2015

- Engaged in meetings and conferences
- Experienced the responsibilities of different positions in a business
- Analyzed annual reports, budgets, and business plans
- Observed teamwork on a variety of projects

LEADERSHIP

Daviess County Band of Pride

Section Leader/First Chair All-District

Owensboro, KY

Aug 2012 – May 2015

- Conducted sectionals and private lessons throughout three school years
- Performed as top baritone player in the district for two consecutive years
- Evaluated at solo and ensemble competitions as being distinguished for four years

National Student Leadership Conference

Nominated Participant

New York, NY

July 2015

- Met with representatives from leading businesses like MasterCard and City Row
- Conducted product pitches and mock business simulations
- Interacted with historic landmarks like the Federal Reserve and Financial District

ADDITIONAL INFORMATION

Skills: Creative Problem Solving, Analytics, Communication

Computer: Proficient in Excel, PowerPoint, Word, Bloomberg

Certifications: Bloomberg Certified

Interests: Running, Nutrition, Investing, Computer Programming

EDUCATION

University of Kentucky – Gatton College of Business and Economics

Bachelor of Business Administration in Finance

Bachelor of Science in Accounting

Lexington, KY

Class of 2018

- Cumulative GPA: 4.0/4.0; Major GPA: 4.0/4.0
- Presidential Scholar (full tuition scholarship); Dean's List all semesters
- Relevant Coursework: Portfolio Management and Analysis, Capital Investment and Financing Decisions, Investment Analysis, Venture Finance, Excel, Intermediate Accounting I & II, Business Statistics

WORK EXPERIENCE

Russell Capital Management

Investment Analyst Intern

Lexington, KY

January 2017 – Current

- Perform research on current economical and financial innovations to discover investment opportunities
- Conduct research to develop a stock portfolio based on the Modern Portfolio Theory
- Attend investment committee meetings to discuss performance results and future market outlook
- Utilized powerpoint and excel to create presentations for market research and potential client portfolio

Student Managed Investment Fund

Student Analyst

Lexington, KY

January 2017 – Current

- One of six students selected to actively manage \$2 million for the University equity portfolio
- Perform equity research on an assortment of companies and give buy/sell/hold recommendations
- Valued companies using DDM, DCF, and comparable company analysis models

LEADERSHIP

Southeastern Hedge Fund Competition, Team Leader

April 2017

- Selected by class to serve as team leader to oversee Southeastern Hedge Fund Competition presentation
- Created a hedge fund strategy that beat the benchmark over a 10 year period by 161 bps, annualized

Finance Society, Member

August 2016 - Current

Appropriations and Revenue Committee, Member

April 2016 – Current

- Reviewed and approved student government's budget to allocate \$650,000 across various accounts
- Allocate money to student organizations requesting funding on a \$220,000 budget

Student Government Association, College Senator

April 2016 - Current

- Voted by peers to represent 3,600 Business College students at University student government meetings

Sigma Chi Fraternity, Executive Committee

February 2016 – Current

- Voted by peers to serve on Fraternity's Executive Committee and oversee chapter operations
- Responsible for running and improving an alumni program that consists of 1600+ members
- Designed a new alumni donation platform for philanthropic fundraising and sponsorships

ADDITIONAL INFORMATION

Certifications: Wall Street Prep Financial Modeling and Valuation; Bloomberg Market Concepts

Modeling: Self-study Financial Modeling and Valuation, M&A, and LBO modeling

Computer: Proficient in Excel, PowerPoint, Bloomberg Terminal

Interests: Golf, Skiing, Intramural Sports, Water Sports, and Personal Investing

EDUCATION

University of Kentucky

Bachelor of Science in Business Administration in Finance & Economics

Lexington, KY

Expected: May 2019

- Major: Finance & Economics; Cumulative GPA: 4.0/4.0
- Relevant Coursework: Financial Accounting, Managerial Accounting, Corporate Finance, Monetary Economics, Intermediate Microeconomics, Intermediate Macroeconomics, Business Statistics

WORK EXPERIENCE

Bluegrass Equity

Private Equity Analyst

Lexington, KY

Jan 2017 – May 2017

- Sourced 500+ companies a week within a \$600,000 - \$3,000,000 EBITDA range through proprietary outreach with an emphasis on the materials handling industry
- Analyzed financials and CIMs to identify competitive advantages in potential targets
- Spread company financials in excel to arrive at a valuation range

Gatton College of Business & Economics

Peer Tutor

Lexington, KY

Aug 2016 – May 2017

- Helped 5-10 students per week understand economic principals in microeconomics, macroeconomics and business statistics

LEADERSHIP

Presidential Scholarship

Recipient

Lexington, KY

Aug 2015 – Current

- A highly selective full tuition scholarship given at the University of Kentucky
- Selected based on leadership, academic excellence, and commitment to community service

Beta Theta Pi Fraternity

Pledge Vice President of Brotherhood

Lexington, KY

Aug 2015 – Dec 2015

- Scheduled and coordinated weekly brotherhood events. Resolved any discrepancies and/or arguments between the 30 members of the pledge class and found a solution that benefited both parties
- Communicated with the Chapter Vice President of Brotherhood on chapter-wide brotherhood events and made sure that pledge participation was 100%

ADDITIONAL INFORMATION

Awards: Dean's List every semester

Computer: Proficient in Excel

Certifications: Completed Bloomberg Certification Program, John and Nellie Wooden Institute Graduate

Interests: Football, Basketball, Special Olympics, Autism Awareness

EDUCATION

University of Kentucky – Gatton College of Business and Economics

Lexington, KY

Bachelor of Business Administration; Finance Major

May 2020

International Business Minor

- GPA: 4.0

Received the Felix E. Martin Scholarship – Competitive scholarship awarded based on academic success and community service

WORK EXPERIENCE

Tatro Capital

Lexington, KY

February 2017- Present

Intern

- Generate and research content for the weekly podcast and radio shows
- Write and summarize news articles on a daily basis
- Communicate frequently and effectively with the CEO
- Analyze stocks using technical analysis

Greenville Country Club Life Guard

Greenville, KY

Summer Job

May-July 2014/2015

- Collaborated with a team of 3 people to provide and achieve the most safety for members
- Trained in rescue and first aid techniques to provide supervision and safety for customers
- Worked daily to keep the pool deck and facilities clean

Greenville Country Club Golf Course Maintenance

Greenville, KY

Summer Job

May-July 2015/ 2016

- Operated heavy machines daily to provide course care
- Communicated with supervisor and coworkers to streamline daily processes
- Received accolade for day-to-day hard work and excellent results

Honors/Activities

Wildcat Investors Club

Lexington, KY

Officer

Aug 2016 – Present

- Research and present finance news PowerPoint about stocks, interest rates, and precious metals during the club wide meeting
- Analyze and discuss investments with other officers for our \$15,000,000.00 simulated portfolio
- Beat S&P 500 by 5.5% from August 2016-December 2016

University of Kentucky Global Scholar

Lexington, KY

Member

Aug 2016 – Present

- Accepted into the especially competitive Global Scholars Program Honors Pathway
- Work and study as a group to complete large volunteering projects with teams of 6 scholars

Finance Society

Lexington, KY

Member

Aug 2016 - Present

- Listen to very experienced and successful business leaders speak about their career

Additional Information

Certifications: Completed Bloomberg Certification Program

EDUCATION

University of Kentucky – Gatton College of Business and Economics

Lexington, KY

Bachelor of Science in Business Administration; Finance and Economics Major

Class of 2019

- Cumulative GPA: 4.0/4.0; Major GPA: 4.0/4.0
- Dean's List Fall 2015, Spring 2016, and Fall 2016
- Relevant Coursework: Financial and Managerial Accounting, Intermediate Economics, Business Management and Statistics, Technology for Business Solutions

WORK EXPERIENCE

General Transfer Entrepreneurs

Pittsburgh, PA

Private Equity Associate Analyst

May 2017– Aug 2017

- Conduct industry and market research for middle-market companies in Greater Pittsburgh Area
- Complete company valuation using discounted cash flow and mandated internal rate of return
- Transfer private company financials into standard financial statements
- Participate in General email, phone, and letter writing campaigns to ensure relationships with brokers

Odyssey.

Lexington, KY

Sales and Marketing Intern

Aug 2016 – Dec 2016

- Negotiated and closed deals with small-business owners in Lexington Area
- Sourced and prospected local sales leads using marketing and communication strategies
- Managed and maintained accountability remotely through weekly coaching calls with a Regional Manager

Living Arts and Science Center

Lexington, KY

Development Intern

Aug 2016 – Dec 2016

- Worked with Development director to research, write, and submit grant proposals
- Volunteered and provided learning experiences in art and science programming for low-income families
- Oversaw fundraising and financial sector of non-profit under Board of Directors
- Utilized Excel to log financial and general data from fundraising events and programming

LEADERSHIP

Off-Campus Student Services

Lexington, KY

Vice-President

Jan 2017 – Current

- Participate in fundraising for Off-Campus Association using marketing and financial strategies
- Represent Off-Campus students at Community Meetings both on and off campus
- Assist in Campus Resource Fairs, Information Sessions, Off-Campus Presentations, and Apartment Hops

ADDITIONAL INFORMATION

Skills: Basic Skills in Spanish

Computer: Proficiency in Microsoft Office (Excel, Word, PowerPoint)

Certifications: Completed Bloomberg Market Concept Certification

Interests: Music, Running, Basketball, Choir, Volunteer Work

CAROLINE WILL

caroline.will@uky.edu

12 Woodhill Rd.
Louisville, KY 40207

502.381.2795

EDUCATION

University of Kentucky – Gatton School of Business and Economics

Bachelor of Science in Economics; French Major; International Business Minor

Lexington, KY

Class of 2018

- Cumulative GPA: 4.0/4.0; Major GPA: 4.0/4.0
- Current President of Beta Gamma Sigma National Honors Society

Burgundy School of Business

School of Commerce

Dijon, France

Jan 2017 – Apr. 2017

- Successfully completed six international management courses and interacted with students from 47 countries

Kentucky Institute for International Studies

Paris II

Paris, France

Jul. 2015 – Aug. 2015

- A five week, six credit hour study abroad program; all classes taught in French

WORK EXPERIENCE

University of Kentucky Center for Business and Economic Research

Research Assistant

Lexington, KY

May 2016 – Present

- Helped organize Kentucky Economics Association Conference (89 in attendance)

Sherwin Williams

Summer Intern

Louisville, KY

May 2016 – Aug. 2016

- Created a project that increased sales by \$2,500 in ten opportunity accounts
- Worked in retail store 25 hours a week learning product knowledge and day to day job descriptions

Gatton College of Business and Economics

Peer Instructor

Lexington, KY

Jan. 2016 – May 2016

- Prepared weekly journal entries, lectured on topic of leadership to 35 students and graded 12 group presentations

LEADERSHIP

University of Kentucky Economics Society

President

Lexington, KY

Apr. 2015 – Apr. 2016

- Organized bi-weekly meetings for 100+ members, including 5+ guest speakers each semester
- Led a group of eight officers and three advisors on a weekly basis through email and/or meeting

Young Women's Empowerment Program

Founder

Lexington, KY

Mar. 2016 – Present

- Co-founded a weekly after school club at Bryan Station Middle School in Lexington, KY focusing on teaching female students the power of their education

DanceBlue Philanthropy

Team Captain

Lexington, KY

Mar. 2015 – Feb. 2016

- Managed a budget of \$4,000+, set up 3 fundraising events, designed team tanks
- Coordinated with 10+ captains and community members, participated in a 24 hour dance marathon

Alpha Delta Pi

Collegiate Mentor

Lexington, KY

Aug. 2014 – Present

- Helped maintain the academic standards of the chapter's 300 members by organizing study hours, binders of materials, and creating study groups

ADDITIONAL INFORMATION

Computer: Proficient in Excel, basic skills in Adobe Photoshop, Bloomberg (BMC) certified

Interests: Golf, tennis, reading, running, traveling, hiking

EDUCATION

University of Kentucky

Bachelor of Business Administration in Finance

Bachelor of Science in Economics

Bachelor of Science in Accounting

- Relevant Coursework: Financial Modeling, Python, Calculus I
- Otis A. Singletary Scholar (Full Ride Scholarship)
- Honors Program

Lexington, KY
August 2014 – Present
May 2018
Cumulative GPA: 4.0/4.0

Arcadia University

- Studied Taxation in Ireland

Dublin, Ireland
June 2016 – July 2016

WORK EXPERIENCE

Neuberger Berman

Incoming Private Equity Summer Analyst

Dallas, TX
May 2017 – August 2017

Gatton College of Business' Equity Portfolio

Portfolio Manager

- One of six students selected to actively manage a \$2.5 million USD equity portfolio
- Selected by class to serve as the Portfolio Manager
- Perform equity research on a variety of companies and pitch buy/sell/hold recommendation

Lexington, KY
January 2017 – Present

UK Endowment Fund

Finance Intern

- Conduct peer benchmarking and industry research for endowment's \$1.2 billion USD fund
- Use Bloomberg to develop and maintain index and investment manager performance dashboards
- Attend due-diligence meetings with investment managers

Lexington, KY
September 2016 – Present

COMMUNITY INVOLVEMENT

Finance Society

January 2016 – Present

UK Appeals Board

August 2015 – Present

CFA Challenge Team

April 2016 – April 2017

- One of five students selected to compete representing the University of Kentucky
- Responsible for research, DCF, and comparable company analysis to derive target price
- Prepared equity research report and presentation for the 2017 CFA Institute Research Challenge

Southeastern Hedge Fund Competition

April 2017

- Created a hedge fund strategy and presented it in Atlanta, GA
- Annualized, the strategy beat the benchmark, over a 10 year time frame, by 161 bps

Interfraternity Council (IFC) Chief of Staff

November 2015 – November 2016

- Increased Junior IFC attendance 100% by transforming the program foundation

DanceBlue Corporate Committee

April 2015 – April 2016

- Collaborated with Fortune 500 companies for donation partnerships totaling over \$125,000 USD

ADDITIONAL INFORMATION

Modeling: Completed Wall Street Prep course covering valuation, M&A, and LBO modeling

Computer: Experienced in Excel, Bloomberg; proficient in Adobe Photoshop

Certifications: Wall Street Prep Financial Modeling, Bloomberg Market Concepts, Microsoft Office, SCUBA

Interests: Traveling, SCUBA, Woodworking, Reading, Hiking, Running, Politics

EDUCATION

University of Kentucky – Gatton College of Business & Economics

Lexington, KY

Bachelor of Business Administration in Finance

Class of 2019

Bachelor of Science in Accounting; Minor in International Business

- **Cumulative GPA:** 4.0/4.0
- **Awards/Honors:** Global Scholars Honors Program, Commonwealth Scholarship, William C. Parker Diversity Scholarship, Von Allmen School of Accountancy Scholarship, Dean's List all semesters

WORK EXPERIENCE

Bluegrass Equity

Lexington, KY

Private Equity Analyst

December 2016 – Present

- Acted as the initial point of contact for business owners and brokers
- Valued private companies within a \$600,000 - \$3,000,000 EBITDA range and put together offering memorandums
- Worked directly with founder to identify attractive investment opportunities

Ball Homes, LLC

Lexington, KY

Accounting Assistant

May 2016 – December 2016

- Recovered \$50,000+ in refunds from a utilities company and a maintenance reserve account
- Completed reconciliations between the subsidiary ledger and general ledger for 25 entities
- Recorded journal entries for cash accounts and entered invoices into the accounting system

University of Kentucky

Lexington, KY

Biomedical Engineering Research Assistant

January 2015 – August 2015

- Completed 360-hour research project on an injectable system intended for kids with Perthes disease
- Utilized data obtained from the Bose Electroforce 3200 instrument and WinTest software to construct stress vs. strain curves as well as force vs. displacement curves

LEADERSHIP

Finance Society

Lexington, KY

President

January 2016 – Present

- Reached out to various professionals in the financial services industry to give presentations at meetings
- Communicated on a daily basis with 5 other officers, faculty sponsors, and 60+ members

Accounting/CPT Club

Lexington, KY

President

January 2016 - Present

- Planned 6 meetings per semester and 1 schoolwide event; communicated all pertinent information to 50+ members
- Reached out to big 4 accounting firms and local CFOs to give presentations at meetings

Delta Tau Delta Fraternity

Lexington, KY

Director of Career Development

January 2016 - Present

- Communicated relevant internship, co-op, and job opportunities to members across all areas of study
- Helped students get involved in various organizations throughout campus and land leadership positions

ADDITIONAL INFORMATION

Modeling: Completed Wall Street Prep self-study course covering valuation, M&A and LBO modeling

Volunteering: Camp Counselor at the Center for Courageous Kids, Mentor to an ESL Student from the Democratic Republic of Congo, Student Teacher for Junior Achievement, DanceBlue

Skills/Certifications Bloomberg Market Concepts (BMC) Certified, Conversational Proficiency in Mandarin

Interests: Skiing, Running, Swimming, Poker, NFL, College Basketball, MLB

TREY ZIMMERMAN

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1010 Doriel Drive
Villa Hills, KY 41017
(859) 445-8770

EDUCATION

University of Kentucky – Gatton College of Business & Economics

Bachelor of Business Administration; Accounting and Finance Major

Lexington, KY

May 2019

- Cumulative GPA: 4.00/4.00
- Otis A. Singletary Scholar, full-ride academic scholarship from the University (\$100,000+ value)
- Relevant Coursework: Corporate Finance, Intermediate Financial Accounting I, Income Taxation

Global Scholar, Gatton College & Lewis Honors College

Minor in International Business

Lexington, KY

- Honors College pathway in conjunction with Gatton College
- Requirement to study abroad during one academic semester, to be completed Fall 2018

WORK EXPERIENCE

J.J.B Hilliard, W.L. Lyons, LLC

Financial Planning Intern

Cincinnati, OH

May 2017 – Aug 2017

- Planned estates and trusts for middle-to-high net worth clients
- Designed spreadsheets to contribute to the financial planning process for professionals and clients
- Implemented new computer systems and assisting professionals in the application of new technology

Student Government Association

Deputy Chief of Staff

Lexington, KY

Oct 2016 – May 2017

- Developed All-Student Survey, using Qualtrics software, that gauged student opinions on campus issues; over 4,200 total responses
- Analyzed survey data through Excel; prepared written report for presentation to school officials, members of the Board of Trustees, and state government officials
- Updated the Student Government website on a weekly basis to include committee minutes and legislation

Student Activities Board

Director of Information Technology

Lexington, KY

Apr 2016 – Apr 2017

- Developed electronic calendar to automatically sync across student devices
- Analyzed website statistics on a weekly basis; oversaw 30% increase in web traffic
- Managed internal email and document sharing through G-Suite

LEADERSHIP

Epsilon Omicron Chapter of Beta Theta Pi Fraternity

Vice President of Communications

Lexington, KY

Nov 2016 – Current

- Maintained records of 150-member chapter, including attendance, policies, and historical documents
- Organized 400-person alumni, parent, member, and Housing Corporation reception
- Communicated with parents and alumni on a bi-weekly basis

Ronald McDonald House Charities of the Bluegrass

Honors Service Peer Mentor

Lexington, KY

Aug 2016 – Dec 2016

- Lead incoming freshman Singletary Scholar in serving at the House
- Rotated between multiple roles to ensure that the scholar served in a variety of roles throughout facility
- Completed fifteen (15) total service hours during the Fall 2016 semester

ADDITIONAL INFORMATION

Skills: HTML coding

Computer: Proficient in Excel, PowerPoint, Bloomberg

Certifications: Completed Bloomberg Certification Program

Interests: Swimming, Southeastern Conference Football, Golf, Cincinnati Sports, Reading

Shawn Brady Hibbitts

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EDUCATION

University of Kentucky Gatton College of Business and Economics **Lexington, KY**
B.B.A. in Finance and B.S. in Accounting; Minor in International Business *May 2025*

- **Cumulative GPA: 4.0/4.0**
- **Wall Street Scholars Program:** 1 of 22 finance majors selected to participate in advanced finance curriculum, technical training, and co-curriculum education
- **Pelissier Scholars Program:** 1 of 16 students selected for advanced technical training leading up to a visit to New York City to network with and learn from finance professionals in a variety of different roles
- **Presidential Scholarship:** Full tuition scholarship awarded to Kentucky Governor's Scholars

PROFESSIONAL EXPERIENCE

VonLehman M&A Advisory **Fort Wright, KY**
Incoming Mergers and Acquisitions Summer Analyst *May 2023 – August 2023*

VonLehman M&A Advisory **Lexington, KY**
Wildcat Advisory Group: Intern *September 2022 – Present*

- Provide deliverables on live sell-side deal tasks, including a buyer's list used by senior leadership for a lower middle market safety and security company
- Perform case studies on past transactions executed by senior leadership, building DCF and LBO models
- Collaborate with senior leadership during weekly meetings to learn about mergers and acquisitions industry, including the deal process, diligence items, marketing materials, and financial modeling

Hometown Bank **London, KY**
Bank Teller *May 2022 – July 2022*

- Interacted with 100+ customers per day, processing requests such as deposits, withdrawals, and money transfers
- Managed records for 10+ London, KY franchises, including Papa John's and Peterbilt

Alliance Cost Containment **Louisville, KY**
Vendor Diversity Initiative Intern *October 2021 – December 2021*

- Analyzed vendor diversity service by performing research on industries and local governments lacking supplier diversity, which was then used by senior leadership to develop a strategy for future client outreach
- Compiled a spreadsheet of 3,000+ contacts, leading to growth in the vendor diversity initiative

Alton Webb Commercial Real Estate **Lexington, KY**
Commercial Real Estate Intern *September 2021 – November 2021*

- Developed a pitch on converting an abandoned building into a modern bar and restaurant after analyzing the investment's data, including the demographics of the surrounding population and the financial details of the property

LEADERSHIP & INVOLVEMENT

University of Kentucky Gatton College of Business and Economics **Lexington, KY**
Finance Teaching Assistant *November 2022 – Present*

- Provide 25+ freshman students with academic advice and assist with resume revisions and mock interviews
- Assist the Wall Street Scholars Program director in creating new curricular and co-curricular activities
- Engage with executives in the finance industry, arranging meetings between them and freshman classes

University of Kentucky Finance Society **Lexington, KY**
Vice President of Programming *April 2022 – Present*

- Plan and manage meetings and activities that promote networking opportunities and financial careers from companies including UBS, Baird, MiddleGround Capital, and Berkshire Hathaway
- Write weekly report distributed to 175+ students regarding market activity and global economic affairs

SKILLS, CERTIFICATIONS, & INTERESTS

Skills: Capital IQ, Bloomberg, Microsoft Suite

Certifications: Bloomberg Market Concepts, Wall Street Prep Financial Statement and DCF Modeling Boot Camp

Interests: Texas Hold 'Em, University of Kentucky Basketball and Football, Hiking

Immanuel Alao

500 S Upper St, Lexington, KY 40508
(402) 769-9688 | tomi.alao@uky.edu

EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance; Minor in Business Analytics

May 2025

- **Cumulative GPA: 3.8/4.0**
- **Scholarships:**
 - William C. Parker Diversity Scholarship - Selected based on essays and test scores.
 - Provost's Scholarship - Competitive scholarship awarded based on academic merit.
 - Litchfield Scholarship - Awarded to only two students
- **Relevant Coursework:** Microeconomics, Macroeconomics, Financial Accounting, Managerial Accounting, Corporate Finance, Intermediate Accounting I&II, Capital Investment and Financing Decisions, Investment Analysis, Calculus, Composition and Communication
- **Honors:** Gatton College of Business and Economics Dean's List 2021 – Present
- **Wall Street Scholars:** 1 of 22 students selected across campus to participate in program with an advanced curriculum, technical training, and exclusive co-curricular activities.
- **Pelissier Scholar:** 1 of 16 students selected for advanced technical training leading up to a visit to New York City to network with and learn from finance professionals in a variety of roles

WORK & LEADERSHIP EXPERIENCE

Gatton College of Business and Economics

Lexington, KY

Technology Teaching Assistant

August 2022 – Present

- Handle the setup and implementation of technology learning platform for 80+ students
- Support Gatton IT in providing remote support for 30+ off-campus graduate students
- Manage instructors and students remote testing

Excelle Financial Services

Dallas, TX

Accounting Shadow

June 2022 – July 2022

- Assisted in preparing tax forms and handling accounting records for 15+ businesses
- Created a financial valuation for the investment depreciation of a client's building

Oneida Baptist Institute

Oneida, KY

Dormitory Custodian Team

November 2019 – March 2020

- Ordered sanitary supplies to maintain appropriate inventory levels of cleaning supplies
- Supervised a team of 10 workers practicing effective communication
- Ensured proper cleanliness and sanitation of dormitories

Oneida Baptist Institute Soccer Club

Oneida, KY

Manager

August 2017 – October 2017

- Managed the scheduling and administration for top-ranked 20-person soccer club
- Organized practices and activities for the club
- Ensured accuracy of scoring records

SKILLS, ACTIVITIES & INTERESTS

Languages: Yoruba, English

Technical Skills: Basic in Python, Proficient in Excel, PowerPoint, QuickBooks, Capital IQ

Certifications & Training: Bloomberg Market Concept (BMC) Certification

Activities & Interests: Finance Society, Real Estate Club, Songwriting, Soccer, College basketball

Craig Badger

824 Gagel Avenue, Louisville, KY | (859) 229-2273 | craig.badger1@outlook.com

EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance, B.S. in Economics; Minor in Mathematics

May 2025

- **Cumulative GPA: 3.83/4.00**
- **Scholarships and Honors:** Dean's List, Full-Tuition Governor's Scholar Program, Lewis Honors College
- **Wall Street Scholars Program:** 1 of 22 finance majors selected to receive advanced curriculum, technical training, and network with professionals in investment banking and private equity
- **Pelissier Scholars Program:** 1 of 16 students selected for advanced technical training leading up to a visit to New York City to network with and learn from finance professionals in a variety of different roles
- **Relevant Coursework:** Corporation Finance, Intermediate Financial Accounting, Intermediate Microeconomics, Macroeconomics, Calculus II, Matrix Algebra, Capital Investment Decisions, Investment Analysis

WORK EXPERIENCE

VonLehman M&A Advisory

Lexington, KY

Wildcat Advisory Group: Intern

January 2023 – Present

- Compete against peers in a Harvard Business School M&A Deal Structuring Case Study
- Create transaction comps and buyers lists for live deals and received training in DCF/LBO modelling

Teacher's Retirement System of Kentucky

Frankfort, KY

Investment Intern

November 2022 – Present

- Conduct market research through competitive analysis, the development of growth assumptions, and having one-on-one discussions with customers, suppliers, and competitors
- Track a watchlist of companies and consistently reevaluate respective investment theses

Aegon Asset Management

Cedar Rapids, IA

Real Assets Debt Intern

August 2022 – December 2022

- Use ARGUS/Excel to perform DCF analysis on properties ranging in value from \$10M to \$100M
- Conduct due diligence on mortgage banking valuations and identify potential sources of overvaluation
- Establish credit ratings by interpolating bond yields to determine the required risk premium and interest rate, deriving forecasted NOI, and evaluating debt service coverage
- Lead a team of interns in an ESG initiative to calculate the percent of female ownership in all borrowing entities Aegon has supplied with funding since January 2021
- Analyze historical trends and shifts in market demographics with CoStar, Claritas Spotlight, and AxioMetrics
- Support the funding of approximately \$235M of commercial mortgage loans

University of Kentucky

Lexington, KY

Teaching Assistant – Department of Economics

August 2022 – Present

- Tutor students in economics and business statistics and assess difficulty of exams
- Review supplemental course material to ensure all items are accurate and concise

EXTRACURRICULAR ACTIVITIES

Campus Crusade for Christ (CRU)

Lexington, KY

Multiplier

September 2021 – Present

- Collaborate with a team of 4 individuals to encourage discipleship and promote growth in faith and fellowship
- Counsel another student on making their faith their own, becoming confident in spiritual conversations, and discovering a passion for sharing the gospel in their surrounding community

SKILLS AND INTERESTS

Skills: Bloomberg Market Concepts Certification, *Wall Street Prep* Valuation and Excel Modeling Boot Camp, Proficient in FactSet, Capital IQ, and ARGUS, Basic in Python

Activities & Interests: Finance Society, Investing, Guitar, European Soccer, NBA

Josiah Baumer

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EDUCATION

University of Kentucky

B.B.A in Finance

Minor in Mathematics, Minor in Statistics

Lexington, KY

Expected Graduation: May 2025

Cumulative GPA: 4.0/4.0

- **Honors:** Lewis Honors College, Otis A. Singletary Scholarship (Tuition + Housing)
- **Wall Street Scholars Program:** 1 of 22 students selected across campus for advanced finance curriculum and exclusive co-curricular career development activities
- **Pelissier Scholar:** 1 of 16 students selected for advanced technical training leading up to a visit to New York City to network with and learn from finance professionals in a variety of roles
- **Certification:** *Wall Street Prep* DCF Valuation & Excel Modeling (11/22), Bloomberg Market Concepts (1/23)
- **Relevant Coursework:** Calculus I, II, & III, Economics and Business Statistics, Intermediate Accounting I & II, Corporation Finance, Capital Investment and Financing Decisions, Investment Analysis
- **Study Abroad:** Corcovado National Park & Cloudbridge Nature Reserve – Costa Rica (1/20)

PROFESSIONAL EXPERIENCE

Evercap Advisors

Investment Banking Intern – Team Lead

Austin, TX

August 2022 – Present

- Create lists of potential target companies that meet the firm's buy-side clients investment thesis criteria and present them to their executive team
- Prepare and deliver client communication documents, manage a CRM database, and participate in/taking notes during client and prospect management calls
- Promoted to lead a team of incoming interns and mentor and transition them throughout ongoing projects

Department of Finance and Quantitative Methods

Finance Scholars Teaching Assistant

Lexington, KY

December 2022 – Present

- Selected as a teaching assistant for 20+ first-year finance scholars in providing technical trainings

Concordia Plan Services

Business Administration Intern

St. Louis, MO

June 2022 – August 2022

- Reviewed the company's dashboards and reports to redesign data inputs, automation, and formatting and utilized Microsoft Excel to visualize and forecast trends
- Analyzed policyholder data and utilized the company's Benefits Administration System to implement quality audits
- Led companywide service event to promote early childhood literacy and packed 700+ bookbags for low-income households in the St. Louis area

LEADERSHIP ACTIVITIES

Student Government Association

Business & Economics College Senator

Lexington, KY

January 2023 – Present

- Represent the college on the Appropriations & Revenue committee to award over \$100,000 in grants to RSO's

Phi Gamma Delta Fraternity

Scholarship Chair

Lexington, KY

December 2022 – Present

- Maintain a chapter-wide GPA of 3.0 by providing incentives such as scholarships for individual improvements
- Organize professional development trainings (resume/cover letter and LinkedIn training) for fraternity brothers

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: S&P Capital IQ, Proficient in Microsoft Excel and PowerPoint, Bloomberg Market Concepts

Activities: Finance Society, Kentucky Sports Industry Conference

Interests: Kentucky Football and Basketball, Weightlifting and Conditioning

Sascha Bravin

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EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance and Minor in International Business

May 2025

- **Cumulative GPA: 3.8/4.0**
- **Scholarships & Honors:** Lewis Honors College, Bluegrass Spirit Academic Scholarship, William C. Parker Diversity Scholarship, College of Public Health Academic Excellence Fund Scholarship
- **Pelissier Scholar:** 1 of 16 students selected for advanced financial training leading up to a visit to New York City to network with and learn from finance professionals in a variety of roles

EXTRACURRICULAR ACTIVITIES

VonLehman M&A Advisory

Lexington, KY

Wildcat Advisory Group: Intern

Jan 2023 – Present

- Compete against peers in a guided Harvard Business School M&A case study and attend weekly educational calls regarding the deal process and current M&A landscape
- Assist senior bankers by developing CIM materials for a live deal, conducting market research, and working through the LBO and DCF financial modeling process

Delta Zeta Sign Language Chair

Lexington, KY

Appointed Officer

Dec 2021 – Dec 2022

- Appointed to present personal knowledge of philanthropy to over 1,000 women
- Led workshop for members to learn basic conversational signs

UK Panhellenic Diversity and Inclusion Committee

Lexington, KY

Committee Member

Dec 2021 – Dec 2022

- 1 of 14 selected students to the committee representing each chapter of Panhellenic
- Developed strategies to build a stronger community and planned diversity events

UK Human Development Institute, Project SCOPE ECHO Series

Lexington, KY

Co-Facilitator

Feb 2022 – May 2022

- Led discussion breakout groups through a series of questions addressing how to better support children affected by the opioid epidemic
- Facilitated discourse among healthcare providers to develop recommendations and presented findings to leadership team

WORK EXPERIENCE

Human Development Institute at University of Kentucky

Lexington, KY

Health Equity Assistant

May 2022 – Present

- Help develop and execute public health and financial empowerment projects serving people with disabilities; assist in interview process of student employees

University of Kentucky, Presentation U

Lexington, KY

Peer Tutor

Jan 2023 – Present

- Tutor students to elevate presentation, speech, and writing skills

SKILLS, ACTIVITIES & INTERESTS

Languages: Fluent in American Sign Language

Skills & Certifications: Bloomberg Market Concepts (BMC), S&P Capital IQ

Activities: Urban Impact Student Volunteer, UK Panhellenic Association, Delta Zeta Intramural Chair, Finance Society

Interests: Fitness, Travel, Basketball, Reading

Jonah Heck

1872 Coachtrail Drive, Hebron, KY 41048

jonahheck@uky.edu | (859) 279-8531 | www.linkedin.com/in/jonahheck

EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance and Economics; Minor in Business Analytics

May 2025

- **Cumulative GPA: 4.0/4.0**
- **Honors & Scholarships:** Presidential Scholarship (Full Tuition), Pelissier Scholarship, Direct Admit Scholar, Dean's List, Kentucky Governor's Scholar
- **Pelissier Scholar:** 1 of 16 students selected for advanced technical training leading up to a week-long visit to New York City to network with and learn from finance professionals in a variety of roles

PROFESSIONAL EXPERIENCE

Corporate Finance Associates

Lexington, KY

Mergers and Acquisitions Intern

Jan 2023 – Present

- Conduct market research, identify potential buyers to build buyers lists, and assist in the deal execution process for middle market companies with sales between \$10M and \$250M
- Create LBO financial models and prepare pitch decks for private equity clients and strategic buyers

VonLehman M&A Advisory

Lexington, KY

Wildcat Advisory Group: Intern

Jan 2023 – Present

- Compete against peers in a guided Harvard Business School M&A case study and attend weekly educational calls regarding the deal process and current M&A landscape
- Assist senior bankers by developing CIM materials for a live deal, conducting market research, and working through the LBO and DCF financial modeling process

SixHorse Creative

Lexington, KY

Finance and Accounting Intern

Aug 2022 – Present

- Create and analyze invoices and financial statements to monitor and maintain expected profitability to present to owner/founder and provide recommendations
- Manage accounts payable and receivable, oversee the fulfillment process of largest client (\$500M in revenue), and train new interns

Logistics Associate

Sept 2021 – May 2022

- Corresponded with suppliers and clients to ensure orders were completed to clients' satisfaction and delivered on time
- Worked with colleagues to create a more productive system to ship \$85,000 in inventory each month which increased logistics efficiency by 30%

Gap

Hebron, KY

Sales Associate

May 2022 – Aug 2022

- Enhanced the Gap customer experience by leading customers through the transaction process and answering inquiries regarding merchandise, prices, etc.
- Implemented unique sales techniques to increase Gap Goods Rewards Credit Card applications by 15%

LEADERSHIP & EXTRACURRICULARS

University of Kentucky Direct Admit Scholars Program

Lexington, KY

Scholar

Aug 2021 – Present

- Meet with Gatton College of Business and Economics executives to discuss curriculum and Gatton college extracurriculars, and partake in professional development activities
- Selected for the program based on status as one of the top 50 students in the Gatton College of Business and Economics

University of Kentucky Finance Society

Lexington, KY

Member

Aug 2021 – Present

- Network with business executives and collaborate with upper-class mentors for professional development
- Explore and discuss financial news and learn technical finance skills

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: Financial Modeling

Certifications & Training: Bloomberg Market Concepts (Jan 2023), *Wall Street Prep's* Financial & Valuation Modeling training program (Nov 2022), S&P Capital IQ, PitchBook

Activities & Interests: Finance Society, Golf, NFL Football

Norton Morais

497 Angliana Ave, Lexington, KY 40508 | (502) 794-3969 | nmo231@uky.edu

EDUCATION

University of Kentucky

Lexington, KY

B.S. in Mathematical Economics and Finance

May 2025

- **GPA: 4.00/4.00**

- **Scholarships and Honors:** International Ambassador Scholarship, William C. Parker Diversity Scholarship, Bluegrass Spirit Scholarship, Thomas Eugene Spragens Scholarship, Lewis Honors College

Wall Street Scholars Program: 1 of 22 selected for advanced finance curriculum and exclusive career development activities

Pelissier Scholars Group: 1 of 16 students selected for advanced technical training leading up to a visit to New York City to network with and learn from finance professionals in a variety of different roles

Kentucky Finance Advisory Board Mentoring Program: 1 of 40 top-performing Finance students receiving mentorship from Kentucky's Finance Board, with emphasis on breaking into investment banking

WORK EXPERIENCE

VonLehman M&A Advisory

Lexington, KY

Wildcat Advisory Group: Intern

September 2022 - Present

- Perform M&A case studies and aid senior bankers with appropriate live-deal tasks, such as due diligence and financial modeling like forecasting a three-statement model
- Develop marketing materials, perform market research, and work through the financial modeling process

More Asset Management

Sao Paulo, Brazil

Summer Analyst

July 2022

- Pitched the idea of increasing 15% of the fund exposure to commodities based on Brazilian macroeconomic research, leading to an investment increase in this market segment
- Met with clients to understand their financial objectives and risk tolerance and made investment portfolio suggestions with different asset classes depending on their risk aversion

Mercury Wealth Management

Sao Paulo, Brazil

Summer Analyst

June 2022

- Summarized meetings with 10+ portfolio managers, evaluating the macroeconomic perspectives of Asian market portfolio managers and how they synergized with Mercury's investment strategy
- Researched the American Federal Reserve policy of raising interest rates and pitched the idea of increasing our exposure to our long dollar-short developing nations' currencies trade, leading to a profit

LEADERSHIP/CAREER DEVELOPMENT EXPERIENCE

JP Morgan Chase Investment Banking Virtual Experience Program

Lexington, KY

Student

January 2023

- Found 5 M&A targets in the premium beverages market in Asia, and further gathered information on the acquisition of the chosen company and the different stages of the bank-run auction process
- Built a dynamic DCF model based on financial forecasts, including EBITDA multiples sensitivity analysis, to have a range of expected company financials in a variety of different market situations
- Provided a revised investment recommendation on how supply chain issues and bidding dynamics impacted the price of the business valuation down for the final stage of the auction process

The Finance for All Project

Salvador, Brazil

Founder and President

March 2019 - March 2020

- Founded to compensate for a lack of financial education in the Brazilian public school system
- Taught 50+ Brazilian students about long-term profitability in the stock market, emphasizing index funds

SKILLS, ACTIVITIES & INTERESTS

Skills & Certifications: Fluent in English, Portuguese, and Spanish. Proficient in Excel, Bloomberg Terminal, Capital IQ, Wall Street Prep Valuation Modeling Bootcamp, and JP Morgan Career.EDU Academy

Interests & Hobbies: Investing Books, College & Pro Sports; Soccer, Football, Basketball, and Blackjack

Extracurriculars: Finance Society, Real Estate Club, Investing Club, Brazilian Studies Association, Soccer

Joshua Plain

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EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance and B.A. in Physics

May 2025

- **Cumulative GPA: 4.0/4.0; ACT Math: 36**
- **Honors:** Kentucky Governor's Scholar, AP Scholar with Distinction, Lunsford Scholar, Pelissier Scholar
- **Scholarships:** Presidential Scholarship (Full-Tuition), 2021 Elks Scholarship, BIACS Scholarship
- **Wall Street Scholar:** 1 of 22 finance majors selected to participate in advanced business curriculum, technical training, and co-curriculum education
- **Pelissier Scholar:** 1 of 16 students selected for advanced technical training leading up to a visit to New York City to network with and learn from finance professionals in a variety of different roles
- **Gatton 3rd Annual Sales Competition:** Placed 5th/26th in a Dell-sponsored customer sales pitch
- **Chellgren Fellow:** 1 of 30 undergraduate students selected for professional coaching and mentored research
- **Rising Leaders Program:** 1 of 15 honors students selected to receive extensive leadership training

WORK EXPERIENCE

BusinessU

Lexington, KY

Accounting Course Writer

Jan 2023 – Present

- Create accounting exercises used by 600+ high school teachers in 40+ states
- Write all problems in a professional tone per the standards of a national publisher
- Regularly review course development with the founder

Silver Fern

Lexington, KY

Business Analyst

Dec 2022 – Present

- Assist with establishing the marketing department at a software startup
- Analyze national media channels to identify marketing opportunities most relevant to the firm's strategy
- Produce marketing strategies for the founders and provide recommendations for marketing projects

University of Kentucky Department of Finance and Quantitative Methods

Lexington, KY

Junior Instructor - Python Programming

Aug 2022 – Present

- Develop python coursework for 20+ students in the Wall Street Scholars program
- Deliver lectures and assist in grading to enhance students' technical skills and uphold program standards
- Hold office hours and work alongside another TA to provide continued support for students in the program

VonLehman M&A Advisory

Lexington, KY

Wildcat Advisory Group: Intern

Sep 2022 – Dec 2022

- Developed LBO and DCF models as part of analyst training program
- Met with senior management on a weekly basis to learn about M&A landscape
- Source buyers list with Capital IQ to assist management in creating the perfect deal

Northwestern Mutual

Evansville, IN

College Financial Representative

May 2022 – Aug 2022

- Introduced clientele to comprehensive financial planning leading to \$700,000+ in new AUM
- Utilize a CRM to manage and maintain all 40+ client connections
- Assist in deal making process by contacting and setting up meetings with my clientele

Lakeshore Country Club

Madisonville, KY

Groundskeeper

June 2020 – Aug 2020

- Managed over \$20,000 worth of equipment and a golf course with three co-workers over 40hr+ work weeks
- Maintain responsibility for all equipment and the quality of the golf course

SKILLS, ACTIVITIES & INTERESTS

Languages: German (Intermediate), Russian (Beginner)

Programming Experience/Skills: Python, Excel, PowerPoint, SQL (Basic)

Certifications & Training: Life and Health Insurance Licenses (Mar 2022), *Wall Street Prep* Financial Modeling and Valuation (Nov 2021), Bloomberg Market Concepts (Dec 2021), Capital IQ

Interests: Tennis, Group Fitness, Student Government, Piano, Non-Fiction Books, Financial Markets

Berenice Cruz

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EDUCATION

University of Kentucky

Lexington, KY

B.B.A in Finance

May 2025

- **Cumulative GPA: 4.0/4.0**
- **Honors:** Dean's List Fall Semester 2021, Spring Semester 2022, Fall Semester 2022
- **Scholarships:** William C. Parker, Provost
- **Relevant Coursework:** Corporate Finance, Financial Accounting, Managerial Accounting, Economic and Business Statistics
- **Wall Street Scholar:** 1 of 22 students selected across campus for advanced finance curriculum and exclusive co-curricular career development activities
- **Pelissier Scholar:** 1 of 16 students selected across campus to visit financial firms in New York City and network with experienced finance professionals

EXTRACURRICULAR ACTIVITIES

Latino Student Union

Lexington, KY

Director of Finance

Dec 2021 – Present

- Communicate with over 140 members throughout the semester about events planned by the organization
- Lead the Hispanic Heritage month celebration collaborating with over 10 on campus and off campus organizations and businesses
- Incentivize members to pay dues so they become active members by raffling prizes, creating competitions, and working with them to facilitate payment
- Manage the organizations bank account ~\$200 and budget the dues collected each semester to have successful events

WORK EXPERIENCE

Wild Eggs

Lexington, KY

Server

June 2022 – Present

- Delegate responsibilities to 8-10 peers to ensure tables are set with enough silverware, ice is getting filled and other tasks to ensure guest satisfaction
- Learned recipes to 20 specialty drinks in order to improve service ability and generate more sales

Agave and Rye

Lexington, KY

Host

June 2021 – Jan 2022

- Trained over 10 hosts by showing them the procedures of the coordinator, seater, and greeter while also managing up to 250 guests
- Provided support during short staffage included working 20-30 hours while balancing student responsibilities

SKILLS, ACTIVITIES & INTERESTS

Languages: Proficient in Spanish

Technical Skills: Python, Microsoft Office Products, Bloomberg Market Concepts, Capital IQ

Activities: Leading Latinas (Mentorship program), Hay Que Hablar (Spanish speaking club)

Interests: Fitness, Astronomy, International Soccer

Andrew Keegan Powell

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EDUCATION

University of Kentucky **Lexington, KY**
B.B.A. in Finance, B.S. in Accounting; Minors in International Business and Computer Science *May 2025*
Gatton College of Business and Economics **Cumulative GPA: 4.0/4.0**

- **Global Scholars Pathway Program** – 1 of 30 business students chosen to participate in intensive coursework based in leadership and international business in association with the Lewis Honors College
- **Wall Street Scholar** – 1 of 20 students selected across campus to participate in a program with an advanced curriculum and tightly coordinated, exclusive co-curricular activities
- **Pelissier Scholars Program** – 1 of 15 top finance sophomores selected to participate in Capital IQ training, networking opportunities, and company visits
- **Relevant Coursework** – Corporate Finance, Investment Analysis, Financial Accounting, Principles of Data Science

PROFESSIONAL EXPERIENCE

JP Morgan **New York, NY**
Incoming Summer Analyst *June 2023 – August 2023*

- Joining a team of finance specialists for summer 2023 as part of JP Morgan's Private Bank Wealth Management Solutions team

VonLehman **Lexington, KY**
Wildcat Advisory Group: Intern *September 2022 – Present*

- Performing M&A case studies and aiding senior bankers with live-deal tasks for successful deal execution
- Developing marketing materials, conducting market research, and working through the financial DCF and LBO modeling

Silver Fern Group – Software Development **Lexington, KY**
Business Analyst *June 2022 – Present*

- Responsible for invoicing 15 clients valued over 100K every month ensuring accurate payment and financial statement balances
- Manage long and short-term forecast by projecting revenues, expenses, and other figures for dynamic financial planning
- Developed and balanced financial statements related to business acquisition for comprehensive managerial use
- Analyzed all accounts during business acquisition for valuation review resulting in a smooth business integration

UBS Financial **Nashville, TN**
Financial Advisory Summer Associate *June 2022 – August 2022*

- Built 24 standard operating procedures for Financial Advisory controls to ensure efficient and structured procedures
- Updated excel for 200+ accounts on a daily basis valued at over \$500K to support Financial Advisory objectives
- Evaluated all Advisory controls through collaboration with upper management to ensure smooth daily operations
- Managed the calendar for senior members of the team by organizing 30+ meetings with Financial Advisors

LEADERSHIP EXPERIENCE

Finance Society **Lexington, KY**
President *December 2022 – Present*

- Leading a team of finance students to support the society's operations and activities, providing valuable leadership experience
- Delegating roles and responsibilities to executive board members resulting in smooth operations and communications
- Restructured and revitalized the configuration of the executive board & integrated consistent membership expectations
- Advanced career growth as Executive Secretary, Treasurer, Vice President, and ultimately President of the organization

Gatton College of Business – Finance Department **Lexington, KY**
Junior Instructor – Course in Python *August 2022 – Present*

- Created material for 20+ students in the Wall Street Scholars program to develop foundational understanding of Python
- Deliver lectures and assist in grading activities to further students' technical skills and uphold program standards
- Serve as a peer mentor providing resume and professional development for underclassmen

Gatton College of Business **Lexington, KY**
Gatton Ambassador *August 2022 – December 2022*

- 1 of 22 students selected to represent Gatton College of Business and Economics at on and off campus events
- Facilitated early outreach to prospective students through tours of Gatton College and pre-enrollment peer advising

ADDITIONAL INFORMATION

Certifications - Wall Street Prep Financial & Valuation Modeling, Bloomberg Market Concepts Certification

Software - Microsoft Suite, Python, PDF Editor, Tableau, JPM Pro, C++

Interests - Piano, Chess, Coding, College Basketball, Travel, Spanish

Mason Quinn

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EDUCATION

University of Kentucky

B.B.A. in Finance, B.S. in Accounting

Lexington, KY

May 2025

- **Cumulative GPA: 3.87/4.00**
- **Honors:** Lewis Honors College, Gatton Honors Pathways, Dean's List (all semesters)
- **Wall Street Scholars:** 1 of 22 finance majors selected to participate in advanced business curriculum, technical training, and co-curriculum education
- **Pelissier Scholars:** 1 of 16 students selected to participate in advanced internship application and technical training as well as a weeklong trip to New York City to network with finance professionals and firms
- **Social Enterprise Scholars:** 1 of 17 business students selected to collaborate in groups to compete to create a business startup aimed at corporate social responsibility and impacting an underserved body of people

PROFESSIONAL EXPERIENCE

Spectrum Financial Alliance

Financial Services Intern

Nicholasville, KY

September 2022 – Present

- Facilitate live market trades for clients, often totaling \$100 thousand - \$1 million, and collaborate with colleagues to meet client needs in real time
- Use platforms such as Morningstar to run reports on client and market data to aid the Managing Principal
- Manage files that record information on 800+ clients to enhance customer relations and retention

VonLehman M&A Advisory

Wildcat Advisory Group: Intern

Lexington, KY

September 2022 – December 2022

- 1 of 12 students selected to engage in weekly calls with senior bankers discussing the deal process and general best practices
- Performed M&A case study analysis, building LBO and DCF models reviewed by senior bankers

Kentucky Farmers Bank

Teller

Ashland, KY

May 2022 – August 2022

- Executed \$30,000 worth of transactions per day and served 80 customers per day
- Worked to educate customers on financial literacy and inform them of products offered by the bank, promoting potential sales

LEADERSHIP AND INVOLVEMENT

University of Kentucky Finance Society

VP of Membership

Lexington, KY

April 2022 – Present

- Manage and regularly update spreadsheet of status and dues of 150+ members
- Facilitate member engagement and retention through networking calls with alumni professionals regarding interview preparation and career advice for internship and job search

Russell Youth Challenger Basketball League

Mentor

Flatwoods, KY

November 2018 – February 2020

- Lead a collaborative effort with the varsity team to teach basketball to children (age 8-14) with special needs

SKILLS AND INTERESTS

Technical Skills and Training: Wall Street Prep Financial Modeling and Valuation Bootcamp, Microsoft Office Suite, Morningstar, Python, Capital IQ, Bloomberg Market Concepts

Interests: Kentucky Basketball, College Football, Travel, Golf, Country Music

Alexander Riley

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EDUCATION

University of Kentucky

Lexington, KY

B.A. in Finance and B.S. in Accounting

May 2025

- **Cumulative GPA: 3.94/4.0**
- **Relevant Coursework:** Corporate Finance, Investment Analysis, Financing Decisions, Micro/Macroeconomics, Advanced Statistics, Financial/Managerial Accounting, Excel Training
- **Wall Street Scholars:** 1 of 22 finance majors selected to participate in advanced business curriculum, technical training, and co-curriculum education
- **Pelissier Scholars:** 1 of 16 students selected for advanced technical training leading up to a visit to New York to network with and learn from finance professionals in a variety of different roles

PROFESSIONAL EXPERIENCE

Lab for Economics & Accounting Proficiency

Lexington, KY

Tutor

Jan 2023 – Present

- Selected based on ability to facilitate student learning in and out of the classroom
- Tutor 200+ students on financial and managerial accounting and resume building
- Students tutored saw an increase in course grade of nearly 10%

Gatton College of Business

Lexington, KY

Gatton Ambassador

Aug 2022 – Present

- Lead college wide social, service and professional events for 1000+ students, focused on building various skills, such as teaching professional dining etiquette and connecting international students
- Work with faculty to recruit 300+ new students into the Gatton college every year

Tropical Smoothie Café

Lexington, KY

Clerk

Aug 2021 – Mar 2022

- Work with management to provide customer a high-quality experience and product
- Process 500+ cash transactions daily at the register and reconcile finances at the end of the day

EXTRACIRRICULAR ACTIVITIES

Living Learning Program Peer Mentor

Lexington, KY

Peer Mentor

Aug 2022 – Present

- Plan and lead with 30+ events including mock interviews, resume building and tutoring
- Provide academic and personal support through many different avenues for 200+ students

Phi Mu Alpha

Lexington, KY

Treasurer

Sep 2022 – Present

- Oversee all financial planning and procurement within a small budget
- Handle banking, and custody of capital through local banks and our national organization
- Increased available budget five-fold through fundraising, running professional and social events

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: Python, Excel, Word, PowerPoint, Tableau, Bloomberg Market Concepts, Capital IQ

Activities: Soccer Referee, University of Kentucky Choristers, Private Contractor

Interests: Music, Premier League Soccer, NBA Basketball, Chess

Kevin M. Sanders

2252 Britt Drive Hebron, KY 41048 | (859) 250-5757 | kevin.sanders@uky.edu

EDUCATION

University of Kentucky **Lexington, KY**
B.S. Mining Engineering, B.B.A. Finance, Minor in International Business *May 2025*

- **Cumulative GPA: 3.81/4.00 Finance GPA: 4.00/4.00 ACT: 35**
- **Honors:** 2022 Jerry Grinstein Leadership Award, Conner High School Valedictorian, 2021 U.S. Presidential Scholars Program Candidate, 2021 Clemson Institute for the Study of Capitalism Lyceum Scholar
- **Scholarships:** Presidential Scholarship, College of Engineering Scholarship, Mining Engineering Scholarship
- **Wall Street Scholars Program:** Selected to participate in advanced finance career development program
- **Scholars in Engineering and Management Honors Pathway:** Enhanced curriculum with coursework tying together aspects of engineering and business with an emphasis on entrepreneurship and building companies
- **Pelissier Scholar:** 1 of 16 students selected for advanced technical training and a visit to New York City to network with and learn from finance professionals in a variety of roles

EXPERIENCE

Von Lehman M&A Advisory **Lexington, KY**
Wildcat Advisory Group: Intern *September 2022 – December 2022*

- Developed LBO & DCF financial models, practiced attention to detail, and followed the M&A deal life cycle
- Gained working knowledge of researching buyers, developing marketing materials, and time management

Coronado Global Resources **Buchanan, VA**
Mine Engineer Intern *May 2023 – August 2023*

- Working with management and engineers to value and develop underground metallurgical coal reserves
- Analyzing investment returns, production strategies, and market demands in mining and heavy industry

Renewable Energy Study Abroad **Zaragoza, Spain**
International Student *June 2022 – July 2022*

- Adapted to life in Spain and learned energy generation economics, market shares, and required commodities

Sanders Ridge Farm **Milan, IN**
Equipment Operator *May 2016 – Present*

- Operated equipment including a sawmill, tractor, MIG welder, and tracked excavator on a seasonal basis

EXTRACURRICULAR ACTIVITIES

University of Kentucky Student Government Association **Lexington, KY**
Senate Vice Chair *April 2022 – Present*

- Served on a special committee to create a distribution system for ~\$1,000,000 of student fee allocations

Senator *October 2021 – Present*

- Spoke directly with University President to offer solutions for issues with University Covid-19 procedures

University of Kentucky Leadership Development Program **Lexington, KY**
Scholar *September 2021 – April 2022*

- Networked with University Administration as a college freshman and learned professionalism and etiquette

UK Engineering Leadership Advantage Program **Lexington, KY**
Scholar *June 2021 – July 2021*

- Led a team of engineering students to create a functional boat from recycled materials at minimum cost

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: *Wall Street Prep* Valuation and Modeling boot camp (Nov. 2021), Bloomberg Market Concepts Certification (Dec. 2021), Python Training for Data Science (Spring 2022), Capital IQ Training (Spring 2023)

Other Certifications: ACTFL Qualified biliterate in German and English, FAA Private Pilot License (100+ hours pilot-in-command experience), FAA Commercial Drone License

Interests: Travel (50 states and 26 countries), Fishing, Hiking, Tennis, Investing, and Language Learning

Osman Siddiqi

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(859) 402-3825 | osiddiqi03@gmail.com | ohsi222@uky.edu

EDUCATION

University of Kentucky

B.B.A in Finance and B.S. in Mathematics
Minor in International Business

Lexington, KY

May 2025

- **Cumulative GPA: 4.0/4.0; ACT: 35**
- **Scholarships:** Provost Scholarship - Academic Merit
- **Global Scholars Pathway:** An Honors program consisting of 24+ students selected to undergo an accelerated curriculum designed to prepare students to confront challenges in the global marketplace
- **Wall Street Scholars Program:** 1 of 22 finance majors selected to participate in advanced business curriculum, technical training, and co-curricular education
- **Pelissier Scholars Program:** 1 of 16 students selected for advanced technical training leading up to a visit to New York to network with and learn from finance professionals in a variety of different roles
- **Relevant Coursework:** Multivariable Calculus, Differential Equations (PDEs and ODEs), Linear Algebra, Set Theory & Probability, Programming Design & Abstraction, Financial & Managerial Accounting, Corporate Finance, Investment Analysis, Capital Investment & Financial Decisions

WORK EXPERIENCE

Wildcat Advisory Group - Von Lehman & Co.

Intern

Lexington, KY

Sep 2022 - Present

- Perform M&A case studies and aid senior bankers at a Northern Kentucky firm with live-deal tasks
- Develop marketing materials, perform market research, and aid in the financial modeling process
- Building skills essential to the investment banking and private equity industries through building LBOs, DCFs, and other quantitative models in Excel

Mathnasium of West Lexington

Tutor

Lexington, KY

Mar 2022 - Present

- Tutor for K-12 students as part of the Mathnasium tutoring center with the goal of promoting academic achievement and mathematical understanding
- Achieved 90% improvement in grades and test scores for over 200 students across all grade levels, while fostering a growth mindset and a love for math

Ameriprise Financial

Intern

Houston, TX

Jun 2021

- Worked with financial advisor managing over \$1.7B in total assets
- Communicated with clients regarding outreach events and important notices about financial opportunities and risks
- Conducted research and presented information to a group of several clients and their families on financial literacy for high-school students

EXTRACURRICULARS

Formula Kentucky

Business Subsystem

University of Kentucky

Feb 2022 - Present

- Commit 10 hours a week as part of the business subsystem for Formula Kentucky, a university-sponsored project to build a racecar for competition
- Source funding from local and national firms, model budgeting scenarios using Excel, coordinate and design marketing materials for sponsorship and recruitment purposes
- Achieved over \$5,000 in spring fundraising while managing a total yearly budget of over \$20,000

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: Java, Python, Excel, R, Capital IQ

Certifications & Training: Wall Street Prep Financial & Valuation Modeling Boot Camp, Bloomberg Market Concepts

Activities & Interests: Mathematics Research, Personal Tutoring, Music Production, European Soccer

Grace Wentz

6675 Greenoak Drive, Cincinnati, OH 45248

(513) 262-8354 | grace.wentz6@gmail.com

EDUCATION

University of Kentucky

Lexington, KY

Bachelor of Business Administration in Finance

May 2025

- **Cumulative GPA: 4.0/4.0**
- **Honors:** Dean's List, Highest Academic Honors, National Honor Society
- **Scholarships:** Bluegrass Spirit Scholarship, GCAJCA Scholarship, Mabry Scholarship, Stephen J. Wiehe and Juliet A. Sadd Endowed Scholarship, Alumni Scholarship, Kiwanis Scholarship, Innovation Scholarship
- **Wall Street Scholars:** 1 of 22 students selected across campus for advanced finance curriculum and exclusive co-curricular career development activities
- **Pelissier Scholars:** 1 of 16 students selected for advanced technical training leading up to a visit to New York to network with and learn from finance professionals in a variety of different roles
- **Relevant Coursework:** Principles of Economics I & II, Financial Accounting, Managerial Accounting, Corporate Finance, Elementary Calculus

EXTRACURRICULAR ACTIVITIES

Blessing Bags

Cincinnati, OH

Co-Founder

Sept 2012 – Present

- Co-founded a service organization that groups alike items together to assemble bags filled with essential items (900+ over time)
- Bags were distributed through the Giving Tree and homeless shelters in the greater Cincinnati area

Cozy Toe-zy's

Cincinnati, OH

Co-Founder

Sept 2010 – Present

- Co-founded a service organization that accepted 7,000 pairs of new socks to be given to people in need throughout the Cincinnati area
- Distributed the socks through the local Giving Tree and homeless shelters in Cincinnati

University of Kentucky Club Soccer

Lexington, KY

Player

Jan 2022 – Present

- 1 of 19 women selected to compete against other collegiate club soccer teams
- Travel to other universities located in the Midwest and Atlantic Coast regions to compete in various matches and tournaments

WORK EXPERIENCE

VonLehman M&A Advisory

Lexington, KY

Wildcat Advisory Group: Intern

Sept 2022 – Dec 2022

- Perform M&A case studies and aid senior bankers with appropriate live-deal tasks
- Develop marketing materials, perform market research, and work through the financial modeling process by building an LBO and DCF model to help bankers make executive financial decisions

Vector Marketing

Dayton, OH

Sales Representative

May 2022 – July 2022

- Met 1 on 1 with clientele to build relationships and to discover what products best fit the customer's needs
- Top 10 seller of product in Buckeye Division (Dayton & Columbus, OH area)
- Learned how to effectively and efficiently communicate with customers to accomplish finding products that fit their needs

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: Bloomberg Certification (BMC), Capital IQ, Microsoft Office, Basic in Python

Interests: Soccer, Painting, College Basketball, Yoga, Baking

Noah Yaacoub

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EDUCATION

University of Kentucky Gatton School of Business and Economics

Lexington, KY

B.B.A in Finance and B.S. Accounting

May 2025

Minors in Economics and Wildlife Biology and Management

- **Cumulative GPA: 4.0/4.0**
- **Pelissier Scholar:** 1 of 16 students selected for advanced technical training leading up to a visit to New York to network with and learn from finance professionals in a variety of different roles
- **Relevant Coursework:** Corporate Finance, Managerial Accounting, Intermediate Accounting, Financial Accounting

PROFESSIONAL

VonLehman and Company, Inc.

Lexington, KY

Wildcat Advisory Group: Intern

Jan 2023 – Present

- Perform M&A case studies through analysis of 10K Annual Reports and Equity Research
- Model the three financial statements and project the future earnings and growth potential to develop a DCF model
- Aid senior bankers with live deals by creating CIM pages for use in an ongoing acquisition
- Participate in a case study calculating WACC and enterprise value to develop projections based off long term growth rates to build exit EBITDA multiples

Raising Canes

Lexington, KY

Crew Member

June 2020 – Aug 2021

- Worked with team to decrease wait times and returns while at 60% staff, growing sales by over 20% in one year
- Managed over \$500,000 of raw materials inventory; restocked using the FIFO accounting method
- Trained four employees in company values and food service best practices

INVOLVEMENT

Finance Society

Lexington, KY

Member

Sept 2022 – Present

- Met to discuss current events and their impacts on federal economic policy decisions
- Hosted keynote speakers from local and global industries to develop technical skills
- Engaged club members and speakers in conversation surrounding their backgrounds and fields of expertise with the intent to advance all members' understanding of careers in finance and spark further connections with employers

Maine Appalachian Trail Club

Skowhegan, ME

Trail Maintenance Volunteer

June 2022 – July 2022

- Collaborated with a team of eight people to complete public works projects on the Appalachian Trail in Maine
- Managed the logistics of transportation and preservation of limited critical resources throughout several weeklong projects by accounting for resource allocation and ease of transportation across unpaved mountain roads
- Resolved logistics issues related to Grip Hoist technology and reduction of forces through multiplied mechanical advantage by measuring the stability of surrounding spruce trees for use as spars utilizing static load testing
- Created dozens of stone staircases and water bars on Third Mountain; reducing erosion on miles of trail while preserving the ecosystem through the perpetuation of strict building and equipment maintenance guidelines

AWARDS, CERTIFICATIONS, & INTERESTS

Certifications and Training: *Wall Street Prep* Financial Modeling and Valuation (Nov 2022), Capital IQ, BMC

Awards: *Awesome Inc. Pitch Competition (First place)*

Interests: Chess (ELO rating of 1050), Long-Distance Backpacking, Classic Literature



Gatton College of
Business and Economics

Gatton College of Business and Economics
University of Kentucky
Lexington, KY 40506-0034

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