

Investment Management Certificate Program (IMCP)

University of Wisconsin-Milwaukee

Lubar School of Business

www.lubar.uwm.edu/IMCP

Class of 2026 Resume Packet:

Gabrielle Naomi Armon-Wickers

Jackson Boott

Jesse Buttner

Devin Casso

Maxwell Curro

Joseph Ehrmann

Jakob Juedes

Taelor Klein

Jack Linge

Azayh Mancl

Cody Nicpon

Andrew Ocasio

Kyler Raube

Luke Sagone

Tristan Simkus

Contact Information:

Director: G. Kevin Spellman, CFA, PhD

608-334-2110; spellman@uwm.edu

Gabrielle Naomi Armon-Wickers

Milwaukee, WI | armonwi2@uwm.edu | (414) 702-0651

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Cumulative GPA: 3.9 | Major GPA: 4.0

Milwaukee, WI

Graduation: May 2026

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes
- Finance 100% of tuition/living expenses through employment while a full-time student

Milwaukee Area Technical College

Technical Diploma in Financial Services

Cumulative GPA: 3.9

Milwaukee, WI

May 2024

PROFESSIONAL EXPERIENCE

Northwestern Mutual Greater Milwaukee

College Financial Representative

Milwaukee, WI

May 2023- May 2024

- Participated in weekly professional and personal development sessions
- Guided prospective clients in crafting tailored financial strategies through comprehensive meetings to assess their financial circumstances
- Leveraged senior advisors for mentorship, receiving valuable feedback and support to enhance client meetings and effectively manage time in independently operating a financial practice

Selected Project Experience

- **Initiating coverage report** for Associated Bank (Ticker: ASB) **Fall 2024**
 - Conducted industry and competitive research to identify the company's business and financial drivers
 - Performed comparable company analysis, 3-stage DCF analysis, and multiples regression analysis

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet, and ISS-EVA Investor Express**
- **Microsoft Excel, Word, and PowerPoint**

EXTRACURRICULAR

Black Student Union

September 2024 - Present

- Vice President

Hobbies

- Assist mother's band, Shuga Blu, with marketing and occasionally performances (sing, dance and play percussion)
- Cooking and cleaning every Sunday for my grandparents while our fur babies run in the yard
- Creating all types of art (music, painting, printing t-shirts etc.)
- Interested in finance and investing since I studied abroad in Madrid, Spain at age 17 when I was confused as to why I received more money one day than I did the next after asking for euros in exchange for 50 USD

List Scholarships

- Fall 2024 Haag Family Foundation Scholarship
- Investment Management Certificate Program Scholarship
- UWM Excellence Award for New Transfer Students

Other

Microsoft Office Specialist: Excel Associate (Microsoft 365 Apps)

March 2024

Wisconsin Accident and Health: General and State Series 22-03

May 2024

Wisconsin Life: General and State Series 22-01

March 2023

Jackson Boott

Milwaukee, WI | email jwboott@uwm.edu | (262) 269-9222

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Milwaukee, WI

Graduation: May 2026

Cumulative GPA: 3.71 | Dean's List: 3/4 semesters

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes
- Finance 42% of tuition/living expenses through employment while a full-time student

Scholarships

Kurt Klumb Memorial Scholarship

Jun. 2024 - Present

Robert Haag Scholarship

Jun. 2024 - Present

PROFESSIONAL EXPERIENCE

Wisconsin Clean Cities

Clean Cities Intern

Milwaukee, WI

Jun. 2024 - Present

- Engage in research and community outreach, increase awareness of reducing vehicle emissions
- Responsible for preparing roundtable events, coverage of alternative fuel stations in Wisconsin
- Presented roundtable events covering propane availability, sustainability, and viability of use

City of Wauwatosa

Finance Intern

Wauwatosa, WI

Oct. 2022 – May 2023

- Presented the Financial Condition Report covering financial statements and net position to the Common Council
- Prepared the yearly Municipal Datatool Report highlighting population and housing statistics
- Utilized Excel functions to analyze data and complete comprehensive reports

Independent Pharmacy Cooperative

Distribution Technician

Sun Prairie, WI

Mar. 2020 – Aug. 2022

- Assisted with the picking and packaging of pharmaceutical orders as well as facilitating responsibilities
- Utilized attention to detail and quality control to minimize picking and packaging errors
- Received several awards for productivity, efficiency, and being a valued member of the team

Selected Project Experience

- **Initiating coverage report** for Weyco Group (Ticker: WEYS) **Fall 2024**
 - Conducted industry and competitive research to identify the company's business and financial drivers
 - Performed comparable company analysis, 3-stage DCF analysis, and multiples regression analysis

TECHNICAL SKILLS

- Bloomberg (basic), FactSet, and ISS-EVA Investor Express
- Microsoft Excel, Word, and PowerPoint

EXTRACURRICULAR

Student Investment Club

Oct. 2022 - Present

- Financial analyst

Hobbies

- Soccer, golf, and weightlifting
- Interested in investing since 2018 when I joined my high school's investment club and invested my own money

Jesse Buttner

Cedarburg, WI | jbuttner@uwm.edu | (262) 910-1786

EDUCATION

University of Wisconsin-Milwaukee

B.B.A. in Finance & Accounting, Certificate in Investment Management

Cumulative GPA: 3.53 | Major GPA: 3.60 | Dean's List: 3/3 semesters

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes
- Finance 85% of tuition/living expenses through employment while a full-time student

Milwaukee, WI

Graduation: May 2026

University of Wisconsin-Milwaukee

Associates of Arts and Sciences

Adventis Financial Modeling Level I Program

West Bend, WI

Aug. 2022

Anticipated Completion: Dec. 2024

PROFESSIONAL EXPERIENCE

Northwestern Mutual

Incoming Investment Operations Intern: Fall / Spring Semester

Milwaukee WI

Sep. 2024

J.P. Morgan Chase

Associate Banker ME

West Bend, WI

May 2023 – Sep. 2024

- Executed over 100 transactions person to person daily, accurately and in compliance with established protocols
- Delivered exceptional customer service, greeting customers, and resolving issues quickly for customer satisfaction
- Educated clients on various financial products as well as online banking and product offerings
- Developed and maintain client relationships through effective communication and personalized service

Algorithm Capital

Portfolio Metrics & Risk Intern

St. Louis, MO

June 2024 – Aug. 2024

- Analyzed quarter on quarter data for mega cap stock portfolio using fundamental and quantitative metrics
- Computed portfolio alpha, deviation, and Sharpe ratio to assess quarter on quarter portfolio risk and efficiency
- Read sell-side reports, performed modeling, and organized portfolio data for an institutional investor database

Farmstead Restaurant

Head Grill Chef/Manager

Cedarburg, WI

Aug. 2018 – Jan. 2024

- Directed kitchen, overseeing the preparation, cooking, and plating of a 4.5-star steak club's menu
- Researched liquidity events, reviewed personal financial statements and asset allocations, and documented new accounts
- Developed a collaborative work culture in fast-paced high-pressure situations and cross trained hires

TECHNICAL SKILLS

- **FactSet, Bloomberg, R-Studios, ISS-EVA Investor Express (In Progress)**
- **Microsoft Excel, Word, and PowerPoint**

EXTRACURRICULAR

JPMorgan Chase Investment Banking Job Simulation

Jan. 2024

- Identified an ideal M&A target for a client based on an assessment of their strategic / financial criteria
- Constructed a DCF model to calculate the intrinsic valuation of the M&A target and adjusted the model to account for a competitor bid and supply chain interruption
- Created a 2-pager for the client containing a company profile and summary of the auction process

Student Investment Club

Jan. 2023 – Present

- Engaged participant in college investment club with equity holdings of over \$135,000
- Researched real estate segment stock/REIT trends and presented in investment meetings

UWM Washinton County Student Government

Jan. 2022 – May 2022

- Collaborated in a team to effectively build club budgets, lead campus events, and cold call vendors for catering

Hobbies & Interests

- Weightlifting, golf, cars, currency collecting, LEGO investing, Next Gen. BRG, boxing, private equity books

Devin Casso

Milwaukee, WI | email dcasso@uwm.edu | (414) 202-3625

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance & Accounting, Certificate in IMCP

Cumulative GPA: 3.63 | Major GPA: 3.66 | Dean's List: 3 semesters

Milwaukee, WI

Graduation: May 2026

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

May 2024 – May 2026

- 21-month CFA University Affiliated Program for a select group of students
- Work on portfolios with over \$10 million AUM and present to investment boards
- Analyze securities over multiple asset classes

Scholarship

- Lawton Scholar

PROFESSIONAL EXPERIENCE

Robert W. Baird

Capital Markets Compliance Intern

Milwaukee, WI

May 2024 – Present

- Maintained accurate and organized records for the compliance database
- Participated in compliance meetings and provided ideas for continual department improvement
- Monitor FINRA regulations and assist the compliance team in implementing new policies and procedures

Northwestern Mutual

Financial Representative Intern

Milwaukee, WI

Jan. 2024 – May 2024

- Conducted comprehensive sales training for new hires, that focused on sales technique, product knowledge, and objection handling
- Utilized role playing workshops to facilitate practical sales strategies
- Developed a personal client acquisition strategy that utilizes referrals, networking with complementary professionals, performing community outreach, and using social media

United States Navy

Legal Clerk

Portsmouth, VA

2020 – Jul. 2022

- Provided legal assistance for 3,500 sailors and their families while maintaining exceptional customer service
- Maintained and recorded all sensitive information documents in Excel that flowed in and out of the Legal Department
- Drafted investigations in Microsoft Word and created signature ready reports for my supervisor and the commanding officer
- Organized all NJP and XOI for the command
- Trained new legal clerks and assisted in supervision, which resulted in higher productivity in the legal office

United States Navy

Naval Security Forces

Manama, Bahrain

Dec. 2016 – 2020

- Operated and led small teams that resulted in 100% task completed
- Consistently achieved 100% pass rate in all base security inspections
- Operated and maintained a Secret clearance

TECHNICAL SKILLS

- **Bloomberg (basic) Tableau, RStudio, FactSet, and CRM Software**
- **Microsoft Excel, Word, OneNote, Outlook, Teams and PowerPoint**

EXTRACURRICULAR

Personal Portfolio

2019 – Present

- Skills in assessing and managing risks associated with trading activities showcased by having a concentrated portfolio during a high volatile period
- Ability to adapt to changing markets conditions and modified trading strategies accordingly demonstrated by taking advantage of commodities during high inflation periods

Hobbies

- Basketball, golf, reading, volunteering, and weightlifting

Maxwell Curro

Maxbaseball9@gmail.com | (414)-522-2728 | <https://www.linkedin.com/in/maxwell-curro-74086b274>

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Milwaukee, WI

Graduation: May 2026

Cumulative GPA: 3.82 || **Dean's List:** 4/5 semesters

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
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 - Analyze securities over multiple asset classes

CRLA (College Reading and Learning Association) Level I Tutor Certification

May 2024

WORK EXPERIENCE

University of Wisconsin-Milwaukee

Introduction to Accounting Supplemental Instructor

Milwaukee, WI

Jan. 2024 – May 2024

- Worked directly with professor and TA to develop course learning strategy
- Held weekly in-person review sessions and exam reviews on the accounting curriculum (50-70 students)
- Responsibilities included teaching and creating review material (PowerPoint, work packets)

Elwood's Liquor and Tap

Security Guard

Milwaukee, WI

May 2024 – Present

- Ensure the safety of guests and responded to on-site emergencies

Fiserv Forum

Security Guard

Milwaukee, WI

May 2022 – Aug. 2024

SELECTED PROJECTS

Sell-Side Equity Research Report: Madison Gas and Electric (Ticker: MGEE)

Fall 2024

- Conducted industry research and company due diligence to identify business and financial drivers
- Performed comparable company, multi-stage DCF, and multivariate regression analysis
- Forecasted sales by analyzing correlations between industry specific weather metrics with energy volumes
- Analyzed energy and data center trends to develop models, assessing their impact on EPS and industry dynamics by evaluating market shifts, technological advancements, and key revenue drivers

CFA Institute Research Challenge: Duluth Trading Co. (Ticker: DLTH)

Oct. 2024 – Mar. 2025

- Collaborated with a team to deliver a professional grade sell side equity research report and presentation
- Performed comparable company, multi-stage DCF, Polynomial APT, and multivariate regression analysis

ACG Cup

Spring 2025

- Wisconsin Investment Banking Competition – Mergers & Acquisitions and Fundamental Analysis
- Collaborated with a team to create a high-quality report and present to management tight within time constraints

TECHNICAL SKILLS

- **Bloomberg, FactSet, ISS-EVA Investor Express, Python, and Data Science (Badge)**
- **Microsoft Excel, Word, PowerPoint, and Tableau**

EXTRACURRICULAR

Hobbies

- Soccer, attending live concerts, reading, and exploring local coffee shop

Joseph Ehrmann

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EDUCATION

University of Wisconsin-Milwaukee

Graduate Certificate in Investment Management

Milwaukee, WI

Graduation: May 2026

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes

University of Wisconsin-Madison

Bachelor of Business Administration in Finance, Investment, & Banking

Madison, WI

Graduation: May 2024

Cumulative GPA: 3.27

PROFESSIONAL EXPERIENCE

Dana Investment Advisors Inc.

Fixed Income Intern

Waukesha, WI

May 2019 – May 2023, Seasonal

- Assisted portfolio managers with recommendations on individual investment grade credits and sectors
- Researched price movements and performed sector analysis using CreditSights
- Examined what-if analysis outcomes to devise proper yields and durations for portfolios
- Participated in learning opportunity events in other cities such as Chicago

JCC Rainbow Day Camp

Camp Counselor

Fredonia, WI

May 2021 – Sept. 2021

- Facilitated sports programs for a group of 20 individuals with special needs, adapting games and activities to ensure inclusivity and to accommodate each participant's unique requirements
- Collaborated with 50 counselors to efficiently set up the campsite with a tight deadline
- Coordinated with various co-workers, such as camp director and inclusion specialist, to ensure smooth operations

TECHNICAL SKILLS

- **Bloomberg, FactSet, and ISS-EVA Investor Express (basic)**
- **Microsoft Excel, Word, and PowerPoint**

EXTRACURRICULAR

Sports Card Business

Owner

March 2016 – Present

- Evaluate and manage risk-reward in the sports card market to optimize investment strategies and maximize returns
- Implement strategies to cater to diverse buyers and sellers, achieving 100% customer satisfaction on multiple selling and buying platforms
- Demonstrate a track record of successful investment growth by growing an initial investment of \$15,000 into a portfolio valued at \$75,000

BFSO: Badgers For Special Olympics

Facilitator

Sept. 2022 – May 2023

- Used past experiences to tailor games and activities to be able to meet requirements set by team leads

Hobbies

- Comedy, golf, and building relationships

Jakob Juedes

Milwaukee, WI | Jcjuedes@uwm.edu | (262) 765-3276

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Cumulative GPA: 3.49 | Major GPA: 3.78 | Dean's List: 4/6 semesters

Milwaukee, WI

Graduation: May 2026

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 million and present to investment boards
 - Analyze securities over multiple asset classes
- Finances 50% of tuition/living expenses through employment while a full-time student

PROFESSIONAL EXPERIENCE

Wisdom Insurance

Account Executive

Pewaukee, WI

May 2023 – Oct 2023

- Engaged with clients to assess their insurance needs, offering tailored solutions and building lasting relationships
- Analyzed risk factors and collaborated with underwriters to recommend appropriate coverage and deliver comprehensive insurance packages
- Maintained an active insurance license with expertise in insurance and sales
- Leveraged web design and social media skills to improve the company's online presence

Hot House Tavern

Bartender & Server

Menomonee Falls, WI

May 2024 – Present

- Provides exceptional customer service, ensuring a positive and memorable dining experience for guests
- Manages bar inventory, restocks supplies, and maintains cleanliness to uphold health and safety standards
- Handles cash and card transactions accurately and balances the cash register

Lake Country Home Repair & Renovation

General Contractor Assistant

Pewaukee, WI

May 2022 – May 2023

- Renovated structures within timeline and budget constraints
- Ensured quality by analyzing materials and workmanship, implementing changes from designers, owners, or inspectors

TECHNICAL SKILLS

- **FactSet, Bloomberg**
- **Microsoft Excel, Word, and PowerPoint Certifications**
- **WSO DCF Modeling**
- **WSO Venture Capitalist**

EXTRACURRICULAR

Student Investment Club

Sept 2023 - Present

- Engaged participant in college investment club with equity holdings of over \$135,000
- Researched information technology sector and presented decks in investment meetings

Volunteer Skate Club Instructor

Nov 2021 – Dec 2023

- Instructed children ages 6-14 in skateboarding techniques and safety, while fostering life skills such as teamwork and perseverance

Hobbies & Interests

- Developed an interest in investing at 15 after learning about the stock market from my parents' financial advisor, sparking a passion for finance and investing
- Reselling items on eBay, graphic design, videography/filmmaking, guitar, skateboarding, and snowboarding

Scholarships

- Baird Advisors in Honor of Gary Elfe IMCP Scholarship
- Investment Management Certificate Program Scholarship
- Chancellors Merit

Taelor Klein

Milwaukee, WI | tmklein@uwm.edu | (414) 916-2232

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance and Marketing

Certificate in Investment Management

Milwaukee, WI

Graduation: May 2026

Cumulative GPA: 3.91 | Business Scholars Program | Dean's List: Fall 2022 - Spring 2024

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
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 - Analyze securities over multiple asset classes
- Finance 100% of tuition/living expenses through employment while a full-time student

EXPERIENCE

US Bank

Product and Experience Design Fellowship

Minneapolis, MN

July 2024 – Aug. 2024

- A month hybrid fellowship experience, flying to Minnesota, corporate mentorship, interviewing practice

Harvey's Bar and Grille

Expeditor

Mequon, WI

Jan. 2022 – Present

- Attention to detail, organization, customer service, time management skills

Selected Project Experience

- **Initiating coverage report** for Lands' End (Ticker: LE)
 - Conducted industry and competitive research to identify the company's business and financial drivers
 - Performed comparable company analysis, 3-stage DCF analysis, and multiples regression analysis

Fall 2024

TECHNICAL SKILLS

- FactSet
- Microsoft Excel, Word, and PowerPoint
- Website development
- Adobe Creative Suite

EXTRACURRICULAR

Student Investment Club

Sept. 2024 – Present

- Technology analyst

Kappa Tau Sorority

Sept. 2022 – Present

- VP of Finance
- VP of Administration

Hobbies

- Baking, video games, ux/ui design
- Interested in investing since my family is investors

List Scholarships

- Lubar College of Business Dean's Scholarship
- Chancellor's Merit Scholarship – Tier 3
- Riverwater Partners Scholarship
- Ladies of UNICO Italian Community Center

Jack Linge

jacklinge12@gmail.com | (612) 532-0173 | <https://www.linkedin.com/in/jack-linge/>

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance | Economics Minor

Milwaukee, WI

Graduation: May 2026

Cumulative GPA: 4.00 | Dean's List: 4/4 semesters

Coursework: Macroeconomics and Financial Markets, Money and Banking, Securities Analysis

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

- 21-month CFA University Affiliated Program for a select group of students
- Work on portfolios worth over \$10 million and present to investment boards
- Analyze securities over multiple asset classes

Student Investment Club

Head Portfolio Manager

August 2022 – Present

- Manage positions and execute trades for a diversified \$154,000 equity portfolio
- Grew student portfolio by 20.1% over a 6-month period
- Developed an investment policy statement specifying risk tolerance, asset allocation, and long-term goals

FINRA Series 65 Exam - Passed

January 2024

- Qualifies candidate to provide investing and financial advice to clients

FINRA Securities Industry Essentials Exam - Passed

August 2023

- Assesses a candidate's basic knowledge of the securities industry

PROFESSIONAL EXPERIENCE

Finance Intern

May 2024 – Present

- Aggregate financial data and conduct industry analysis to create high-quality models
- Analyze financial statements to create DCF and LBO models for multiple tuck-in acquisitions
- Utilize intrinsic and relative valuation methods to determine a firm-wide valuation for a \$25m healthcare conglomerate. Apply multiple methodologies to estimate standalone and pro-forma cost of capital
- Assist company executives to identify and address discrepancies, leading to \$75,000+ debt collections

Treasure Island Resort & Casino

Red Wing, MN

Kitchen Technician

May 2023 – Present

- Ensure efficiency and excellent customer service at a high-end steakhouse restaurant

Jpl Cards

Maiden Rock, WI

Owner

Mar 2022 – Jan 2023

- Engaged in e-commerce and investment activities relating to trading card franchises
- Grew alternative-asset portfolio by 24% over a 1-year period
- Employed long-term alternative investment strategies in a \$20,000 real-asset portfolio

SELECTED PROJECTS & COMPETITIONS

- **ACG Cup 2024** *March 2024*
 - Wisconsin Investment Banking Competition – Mergers & Acquisitions and Fundamental Analysis
- **Waste Management Equity Research & Stock Pitch** *May 2024*
 - Successfully pitched WM to a board of industry professionals for a real-money equity portfolio
- **SIC 2023 Stock Trading Competition (Winner)** *March 2023*
 - Student Investment Club Trading Competition – Stock Trading and Technical Analysis

TECHNICAL SKILLS

- Microsoft Excel, PowerPoint, and Word – Google Sheets, Slides, Docs, and Data Studio
- FactSet (Portfolio Analysis, Universal Screening certifications)
- Bloomberg (Basic), YCharts (Intermediate), R-Studio (Basic), UKG (Intermediate), QuickBooks (Basic)

Azayh Mancl

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EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Milwaukee, WI

Graduation: May 2026

Cumulative GPA: 3.78 | Business Scholars Program | Dean's List: Fall 2022 – Spring 2024

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

- 21-month CFA University Affiliated Program for a select group of students
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Finance 100% of tuition/living expenses through employment while a full-time student

PROFESSIONAL EXPERIENCE

Butte Des Morts Country Club

Lead Bartender/Server

Milwaukee, WI

July 2020 – Present

- Managed daily member charges and maintain 100% accuracy in closing and opening tabs
- Improved sales through effective upselling and promotion of drink sales
- Proven ability to multitask by handling customer service alongside inventory management
- Networked with successful businessmen/women

Touchmark Assisted Living

Server

Milwaukee, WI

Apr. 2020 – Sep. 2020

- Collaborated with colleagues to provide exemplary service to residents
- Created professional relationships with coworkers and residents
- Demonstrated good ethics when working with elderly

TECHNICAL SKILLS

- Bloomberg (basic), FactSet, and ISS-EVA Investor Express
- Microsoft Excel, Word, and PowerPoint
- R coding
- Canva

EXTRACURRICULAR

Student Investment Club

Sept. 2024 – Present

- Engaged participant in college investment club with equity holdings of over \$135,000
- Technology analyst – research and analyze sector and company trends and present ideas

Hobbies

- Reading, traveling, watching movies
- Interested in investing since being responsible for personal finances

Scholarships

- Chancellors Merit Scholarship – Tier 3
- Lubar scholarship
- IMCP scholarship

Cody Nicpon

Hartford, WI | cody.nicpon@icloud.com | (262) 224-9962

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance

Milwaukee, WI

Graduation: May 2026

Cumulative GPA: 3.72 | Business Scholars Program | Dean's List: All semesters

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

- 21-month CFA University Affiliated Program for a select group of students
- Work on portfolios worth over \$10 million, and make presentations to investment boards
- Analyze securities over multiple asset classes

PROFESSIONAL EXPERIENCE

A.B. Data

Accounting Intern

Milwaukee, WI

Feb. 2024 – Aug. 2024

- Assisted in the Accounts Payable and Receivable division as well as duties in the mailroom
- Responsibilities included creating jobs in the system, creating proformas, emailing clients, updating Tax Exemption forms, and working together with coworkers to complete tasks

Washington County Golf Course

Business Intern

Milwaukee, WI

May 2021 – Aug. 2024

- Responsible for taking inventory in the pro shop, answering phone calls, helping run outings or events, ranger the course, checking in people for tee times
- Trained new staff members and closed down operations at the end of the day

TECHNICAL AND PERSONAL SKILLS

- Microsoft Excel, Word, Outlook, and PowerPoint
- Bloomberg (basic), FactSet, ISS-EVA Investor Express

EXTRACURRICULAR

Hobbies

- Fantasy football, basketball, baseball, fishing, lifting weights, socializing, golfing, and running
- Interested in investing since I was 14 when I sat with my father and watched him invest his own money

Activities

- Member and Treasurer of Kappa Sigma Fraternity
 - This further developed my communication, public speaking, and leadership skills, and taught me how to create budgets and payment plans for members
 - Reliable and honed my decision-making and negotiation skills with vendors and/or businesses when we host events or reach out for sponsorships
- Participated in football and baseball all four years of high school
- Volunteer for Salvation Army, Operation Christmas Child, Toys for Tots, Jewish Museum, and Milwaukee Bucks

Scholarships

- *Gridiron Football Scholarship*
- *Ruth Walker Scholarship*
- *Business Panthers Scholarship*
- *Baird Advisors in Honor of Gary Elfe IMCP Scholarship*
- *Investment Management Certificate Program Scholarship*

Andrew Ocasio

Milwaukee, WI | Andrew.ocasioba@gmail.com | (414) 467-4988

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance, Certificate in Investment Management

Milwaukee, WI

Graduation: May 2026

Cumulative GPA: 3.709 | **Major GPA:** 3.68 | Lawton Scholars Program | Dean's List: 2023-01-03, 2023-12-29, 2024-05-23

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
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 - Analyze securities over multiple asset classes
- Finance 100% of tuition/living expenses through employment while a full-time student

PROFESSIONAL EXPERIENCE

Inclusa

Caregiver

Green Bay, WI

May 2020 – Present

- Develop and maintain positive relationships with clients by providing emotional support and companionship
- Provide compassionate care and support to individuals with disabilities, enhancing their quality of life
- Assist with family living activities, including personal hygiene, meal preparation, and medication management

COA

Data Entry Specialist

Milwaukee, WI

Jan. 2024 – Aug. 2024

- Responsible for efficiently entering and updating data into databases and spreadsheets with precision
- Ensure timely completion of data entry tasks while maintaining high levels of accuracy and quality
- Coordinated with multiple districts within the area to assure accurate information

Village of Howard Public Works

Street Operations

Green Bay, WI

Jun. 2022 – Sep. 2022

- Conducted maintenance and repairs on city streets, ensuring the safety and functionality of roadways
- Operated heavy equipment and machinery efficiently, contributing to the overall infrastructure maintenance
- Implemented innovative ways to optimize street operations and reduce cost through the use of technology and data analysis

The Youth Men's Christian Association

Lifeguard

Green Bay, WI

Oct. 2019 – Jan. 2021

- Ensured the safety and well-being of all pool patrons by closely monitoring activities
- Enforced pool rules and regulations, promoting a safe and orderly aquatic environment
- Responded promptly to emergency situations, demonstrating strong problem-solving skills

TECHNICAL SKILLS

- Bloomberg (basic), and FactSet
- Microsoft Excel, Word, and PowerPoint
- Proficient in Spanish

EXTRACURRICULAR

Delta Sigma PI

- Vice President – Scholarship & Awards

May 2024 – Present

Hobbies

- Kickboxing, weightlifting and reading
- Investing in the stock market since 2019

Kyler Raube

Milwaukee, WI | kwraube@uwm.edu | (920) 904-6201

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance

Certificate in Investment Management

Cumulative GPA: 3.4 | Dean's List: 2/4 semesters

- **Investment Management Certificate Program** (lubar.uwm.edu/IMCP)
 - 21-month CFA University Affiliated Program for a select group of students
 - Work on portfolios with over \$10 mil and present to investment boards
 - Analyze securities over multiple asset classes
- Finance 100% of tuition/living expenses through employment while a full-time student

Milwaukee, WI

Graduation: May 2026

PROFESSIONAL EXPERIENCE

Northwestern Mutual

Investment Operations Intern

- Maintain investment data and systems, and perform reconciliations
- Assist in preparing financial reports for weekly committee meetings
- Assist Investment Operations team to provide efficient execution of private transactions

Milwaukee, WI

Sep. 2024– Present

Generac

Treasury & Credit Analyst Intern

- Communicated with IT team and controllers to create FX exposure report to build a strategic hedging method
- Recommended investment decisions to manager & treasurer ~\$1B in investment recommendations
- Assisted Corp Development in company research, shared companies that matched Generac's strategic plan
- Pulled 550 business credit reports and analyzed over 50 financial statements to assess credit limit
- Worked with Generac's foreign subsidiaries' CFOs & controllers to lead on bank RFP

Milwaukee, WI

Mar. 2023 – Sep. 2024

Menards

Sales

- Exhibited the ability to multitask, prioritize, and focused on growth
- Solved problems daily and on the spot with new customers with complex issues
- Sold over 100,000 in merchandise, wrote up invoices

Milwaukee, WI

Jan. 2021 – Mar. 2023

Selected Project Experience

- **Initiating coverage report** for Google (Ticker: GOOGL) *Spring 2024*
 - Conducted industry and competitive research to identify the company's business and financial drivers
 - Performed comparable company analysis, 3-stage DCF analysis, and multiples regression analysis
 - Presented in front of a hand selected board and answered questionnaire effectively

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet, OneStream & SAP**
- **Microsoft Excel, Word, and PowerPoint**
- **VBA, Python (basic), web scraping, and website development**

EXTRACURRICULAR

Student Investment Club

Sep. 2022 – May 2023

Captain of Intramural Basketball Team

Sep. 2023 – Jan. 2024

Hobbies

- Basketball, golf, downhill skiing, lifting, outdoor activities, movies and beginner chess
- Interested in investing since pandemic (high school) when I performed basic market research

Scholarships

- Fond du lac Foundation Scholarship
- Barid Advisors Scholarship & IMCP Scholarship

Luke Sagone

sagoneluke@gmail.com | (847)-456-6676 | Milwaukee, WI

EDUCATION

University of Wisconsin-Milwaukee

Bachelor of Business Administration in Finance | Economics Minor

Cumulative GPA: 3.70 | Dean's List: 3 semesters

Milwaukee, WI

Graduation: May 2026

Coursework: Securities Analysis, Managerial Accounting, Business Statistics

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

- 21-month CFA University Affiliated Program for a select group of students
- Work on portfolios worth over \$10 million and present to investment boards
- Analyze securities over multiple asset classes

PROFESSIONAL EXPERIENCE

Robert W. Baird & CO

Commissions and Advisory Billing Intern

- Analyzed commissions data and built reports for financial advisors
- Format commissions statements to Excel
- Calculate commission amounts based on trade specifications
- Updated commissions processes to improve productivity
- Corrected commissions on trades using Liquid Office
- Journal commission between advisors in an accurate manner

Milwaukee, WI

May 2024 – Present

Cedarburg History Museum

Events Intern

- Organized and executed the replacement process of museum exhibits
- Researched and archived artifacts in museum's storage
- Authored a research article on local historical architecture
- Planned booths for local festivals

Cedarburg, WI

May 2023 – July 2023

SKILLS

- Microsoft Excel, Word, and PowerPoint
- Microsoft SQL
- FactSet and Bloomberg (basic)

EXTRACURRICULAR

Student Investment Club

Sector Analyst

August 2023 – Present

- Analyze positions and vote on trades for a diversified \$154,000 equity portfolio
- Grew student portfolio by 20.1% over a 6-month period
- Analyzed club's positions in the industrials sector providing bi-weekly reports on performance

University of Wisconsin Club Lacrosse team

Brother in Delta Sigma Pi Business Fraternity

Tristan Simkus

Milwaukee, WI | email tasimkus@uwm.edu | (815) 412-0266

EDUCATION

University of Wisconsin-Milwaukee

Master of Science in Finance, Certificate in Investment Management
Bachelor of Business Administration in Finance

Milwaukee, WI

Graduation: May 2026
Graduation: May 2025

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

- 21-month CFA University Affiliated Program for a select group of students
- Work on portfolios with over \$10 mil and present to investment boards
- Analyze securities over multiple asset classes

PROFESSIONAL EXPERIENCE

UWM Recreation

Fitness Attendant

- Provide high level of customer service while supervising the UREC fitness center
- Maintain equipment and machines to ensure good operating condition

Milwaukee, WI

July 2023-Present

Connelly Electric

Warehouse Worker, Trainee

- Coordinated incoming and outgoing construction materials to job sites in an organized manner
- Collaborated with other trades and general contractor to ensure safe and regulated workplace

Addison, IL

Jan. 2021-Aug. 2022

Selected Project Experience

- **Initiating coverage report** for Enerpac Tool Group (Ticker: EPAC)
 - Conducted industry and competitive research to identify the company's business and financial drivers
 - Performed comparable company analysis, 3-stage DCF analysis, and multiples regression analysis

Fall 2024

TECHNICAL SKILLS

- **Bloomberg (basic), FactSet, and ISS-EVA Investor Express**
- **Microsoft Excel, Word, and PowerPoint**
- **VBA, Python (basic), web scraping, and website development**

EXTRACURRICULAR

UWM Football Club

- Treasurer and captain
- Won Iron Man Award for the most resilient player

Sep. 2021-Feb. 2023

Delta Sigma PI

April 2022-Present

Hobbies

- Working out, power lifting, sports, and films
- Interested in investing since high school through an accounting and a general business class where participated in and performed well in an investment simulation

IBEW Power Forward DuPage Scholarship