

Drew Lickman - Financial Advisor

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SUMMARY

Financially savvy entrepreneur with a strong background in investment analysis, financial technology, and business development. Passionate about leveraging data-driven insights to optimize financial strategies. Currently pursuing Series 65 license to become a registered investment advisor. Demonstrated expertise in portfolio management, process improvement, and client relations, with a track record of leadership and problem-solving. In under 5 years I have built a personal investment portfolio valued over **\$100,000**, focusing on long-term growth through strategic investments in innovative sectors like AI, automation, energy, and fintech.

EDUCATION

B.S in Computer Science & Minor in Entrepreneurship @ Middle Tennessee State University
August 2020 - December 2024

3.6 GPA | Dean's List 4 times

Key Coursework: Financial Management, Investment Analysis, Data Structures & Algorithms, Entrepreneurship, Marketing, Data Analysis

INVESTMENT APPROACH

- **Long-Term Growth Strategy:** Focused on identifying innovative companies with strong growth potential, particularly in emerging technologies like AI and nuclear energy
- **Retirement Planning:** Utilizing Roth IRA accounts to maximize tax-free growth for retirement savings
- **Diversification:** Maintaining a balanced portfolio across traditional securities and alternative investments including strategic cryptocurrency positions
- **Research-Driven:** Conducting thorough fundamental and technical analysis before making investment decisions
- **Risk Management:** Implementing disciplined position sizing and regular portfolio rebalancing to optimize risk-adjusted returns

SKILLS

- **Finance & Investment:** Portfolio Management, Financial Analysis, Investment Research, Risk Assessment, Tax-Advantaged Retirement Planning, Cryptocurrency Literacy
- **Technology & Tools:** Excel, Python, Data Analysis, Financial APIs
- **Business & Strategy:** Entrepreneurship, Strategic Planning, Financial Forecasting, Long-term Growth Investing
- **Soft Skills:** Leadership, Relationship Building, Communication, Problem-Solving

PROJECTS

Stock Portfolio Analysis App Winter 2025

- Developed a financial application to analyze stock portfolios and calculate returns
- Integrated Financial Modeling Prep API for real-time and historical stock data retrieval
- Implemented CSV import functionality for transaction data processing
- Designed a dashboard to visualize portfolio performance over time

Financial Data Filtering App Winter 2025

- Fetched and processed financial statement data from publicly traded companies using Financial Modeling Prep API
- Designed a frontend for sorting, filtering, and visualizing financial data
- Deployed application online via Vercel for ease of access

PROFESSIONAL EXPERIENCE

Founder | D8 Knight 2024 - Present

- Conducted personal business financial forecasting to ensure sustainability and growth
- Performed cold email outreach to similar businesses to establish professional connections
- Applied investment research methodologies to identify market opportunities

Student Technology Assistant (Team Leader) | MTSU Walker Library Spring 2022 - Winter 2025

As a Student Technology Assistant (Team Leader), I was responsible for ensuring the smooth operation of computer systems and providing technical support to users. I trained employees and patrons on equipment, software, and network connectivity, and oversaw the maintenance of computer equipment. Additionally, I created updated training instructions and detailed documentation for software programs, contributing to a higher quality understanding and retention of procedures.

- Automated login processes with batch scripts, saving staff time
- Provided technical support and training across various software systems and hardware equipment
- Developed and deployed updated training instructions for employees
- Applied problem-solving skills to resolve technical issues efficiently