

# CARLSON *FUNDS ENTERPRISE*



## Student Resumes

**Carlson Funds Enterprise**  
Carlson School of Management  
University of Minnesota  
321 19th Ave. S., Suite 1-170A  
Minneapolis, MN 55455-0438

Phone: 612-624-0020  
Fax: 612-626-7012  
cfe@umn.edu  
[www.carlsonschool.umn.edu/funds](http://www.carlsonschool.umn.edu/funds)

# M. SAM BEVIER

1330 Washburn Ave N. • Minneapolis, MN, 55411 • (612) 554-2587 • bevi0022@umn.edu

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, MN

Carlson School of Management / Humphrey School for Public Policy

Candidate for **Master of Business Administration** / Master of Public Policy

May 2015

Emphasis: **Finance and Strategic Management** Minor: Integrative Leadership

GPA – 3.90 GMAT – 710 BAT – 670

1<sup>st</sup> place at John Molson International Strategy Case Competition among 36 MBA programs.

UNIVERSITY OF MINNESOTA, Morris, MN

Bachelor of Arts – **Economics, Financial Management, Computer Science**

May 2008

## EXPERIENCE

INTELLECTUAL VENTURES, Bellevue, WA

June 2014 – Present

### **Investment Strategy Intern**

- Research and develop tools to improve asset acquisition and licensing for the world's largest patent aggregator by exploring new strategic business models, improving IP valuation methods, and providing analytic support for the long term development of innovation ecosystems.
- Model and implement one of the first intellectual property exchanges, designed to improve asset valuations, create new revenue streams, and inform future acquisition and licensing decisions.

CARLSON FUNDS ENTERPRISE – FIXED INCOME, Minneapolis, MN

March 2014 – Present

### **Fund Development Strategist**

- Connect with internal and external stakeholders to inform future strategic direction for \$18M fund.
- Analyze 3 corporate credits and industry, resulting in buy/sell/hold recommendations to fund.

COMMON GROUNDS, Minneapolis, MN

September 2012 – Present

### **Steering Committee Chair / Project Director / Project Lead**

- Manage recruitment activities, group infrastructure development, and external branding strategy for graduate student consulting group engaging in capacity-building projects for local non-profits.
- Trained and advised 8 project leaders during project sourcing, scoping, execution, and delivery.
- Independently worked with local non-profit leaders to source and scope 4 potential consulting projects. Recruited team members and delivered client plan to increase sponsorship revenue by 20%.

ECOLEAGUES, INC., Minneapolis, MN

May 2013 – July 2013

### **Small Business Consultant**

- Spearheaded launch of local startup “gamifying” household energy consumption using a mobile app.
- Laid groundwork for entry into industry, including building strategic relationships, modeling business and regulatory landscape, profiling competitors, and developing business plan.
- Advised business owner against long term commitment to project, avoiding losses in excess of \$100K.

UNITED STATES BUREAU OF THE CENSUS, Minneapolis, MN

August 2009 – September 2010

### **Assistant Manager for Quality Assurance**

- Hired, trained, and coordinated 50+ decentralized field and office staff for multiple concurrent quality assurance operations in time-sensitive environment. Achieved one of the best urban counts nationwide.
- Interfaced with community organizations and city leaders to identify, staff, and support 80+ optimal sites for assistance centers based on community socioeconomic factors and expected response rates to ensure positive public relations and accurate count.

## LEADERSHIP

- Volunteer Coordinator for the 2014 Net Impact National Conference in Minneapolis, MN
- Financial modeler. Computer programmer in Java, Python. Statistical analyst in R, STATA, SAS, SPSS.
- Black belt in Tae Kwon Do. Taught classes, competed in many tournaments and judged competitions.

# MATTHEW BORN

26645 Oak Street • Elko New Market, MN 55020 • (952) 374-8148 • bornx083@umn.edu

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, MN

Carlson School of Management

Candidate for **Master of Business Administration**

May 2015

Emphasis: **Finance**

GMAT: 710 (92nd percentile)

EMBRY-RIDDLE AERONAUTICAL UNIVERSITY, Daytona Beach, FL

Master of Science, Management, *with distinction*

December 2010

4.0/4.0 GPA

UNIVERSITY OF NORTH DAKOTA, Grand Forks, ND

Bachelor of Science, Aviation, *summa cum laude*

May 2004

Air Force ROTC, 3.72/4.0 GPA

## EXPERIENCE

WELLS FARGO BANK, Minneapolis, MN

June 2014 – Present

### **Commercial Banking Summer Associate**

- Administering credit process for office's \$2.9B portfolio of local \$20M-\$1B revenue middle-market companies revolving lines of credit & term debt for working capital, growth & M&A needs
- Executing financial analysis of profitability, liquidity, leverage & cash flows to evaluate credit worthiness
- Developing sales skills for credit and cross-selling complementary products, such as treasury, FX, swaps

ARCTIC CAPITAL, Minneapolis, MN

October 2013 – Present

### **Private Equity Associate Intern**

- Conducting in-depth analysis of industry & investment environment for middle market LBO opportunities
- Researching company valuations/financial models and engaging mgmt for growth capital deal sourcing

MERRILL LYNCH, Bloomington, MN

September 2012 – August 2013

### **Financial Advisor**

- Researched 25 investment proposals for HNW clients/prospects and built pipeline of over 100 executives
- Registered Investment Advisor Rep, earning Series 7/66 & MN Life & Health Ins certs, 1 of 6 CFP exams

CINTAS CORPORATION, St. Louis, MO

February 2012 – September 2012

### **Advanced Management Partner, Service Manager**

- Promoted 7 months early to manage team of 8 in GM pgm, climbing to top 16%, 15% revenue growth
- Maintained customer relations for 1K cust accts, resulting in 15 new accts/\$50K annual revenue increase

UNITED STATES AIR FORCE, Various (FL, OH, DE, and ND)

May 2004 – February 2012

### **Airfield Operations Officer**

- Led 3 branch-level organizations with total staffing of more than 250, ensuring readiness, training and evaluation, resulting in 50 overseas deployments and 98% compliance on three functional audits
- Oversaw 3 airfields and 12K square miles of airspace, supervising 30 construction projects totaling \$200M
- Deployed to Kuwait as liaison to Kuwait Air Force/Int'l Airport auth, & oversaw \$50M air cargo contract
- Recognized twice as top officer of 35 in career field, top junior officer among 150 peers, two distinguished grad awards, top 20% grad at Squadron Officer School, and selected as Commander's top assistant twice

## LEADERSHIP & ACTIVITIES

- Officer in IL Air Nat'l Guard since 2012—Chief, Airspace Management Team, recent promotion to Major
- Corp Relations Development at Metafrazo, LLC since Aug 2013—promoting author/filmmaker/vet hiring
- Mbr Assoc for Corp Growth, Rotary, MBA Vets/Fin Club; Nat'l I-Bank Comp finalist, ACG Cup winner

# TIMOTHY BYRNE

317 Groveland Ave, Unit 305 Minneapolis, MN 55403 (708) 539-4338 byrne265@umn.edu

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, MN

Carlson School of Management

Candidate for Master of Business Administration

May 2015

Emphasis: **Finance**

GMAT Score: 730

DUKE UNIVERSITY, Durham, NC

Bachelor of Science, Economics

May 2007

## EXPERIENCE:

J.P. MORGAN PRIVATE BANKING, Minneapolis, MN

September 2010 – April 2012

### Banker Associate

- Created and presented new business proposals that were responsible for adding 15 new client relationships totaling more than \$40MM to my team's book of business in 2011
- Provided day-to-day account servicing for client book of more than 50 relationships totaling more than \$100MM in total assets and generating in excess of \$500,000 annual revenue
- Analyzed client and prospect income statements, balance sheets and investment allocations and suggested potential strategies for additional client penetration and new business development
- Assisted in the creation and implementation of a series of road shows in 2011 designed to increase corporate visibility within the Minneapolis professional communities of attorneys and accountants
- Designed and implemented a training program for two analysts hired in 2010
- Earned FINRA Series 7, Series 63 securities licenses and NMLS Mortgage Loan Originator license

J.P. MORGAN PRIVATE BANKING, Chicago, IL

June 2007 – September 2010

### Analyst

- Built analytical models to solve client questions covering a range of topics, including financial planning, stock option analysis and business succession planning
- Participated in testing and rollout of new asset allocation and cash flow modeling tool and organized training sessions for other analysts focused on using the new tools to create impactful client materials
- Delivered presentations to clients and prospects, becoming one of the few analysts trusted to participate in face-to-face client interactions

## COMMUNITY INVOLVEMENT

- Minneapolis Rotaract Volunteer 2011-Present
  - Board Member, Oct. 2011-June 2012
  - Treasurer, July 2012-June 2013
  - President-Elect, July 2013-Present
  - Co-Chair, Celebration of Rotaract Gala, March 2013

# KRISTOPHER CHUCKO

6704 Southdale Road • Edina MN, 55435 • (612) 968-7513 • chuck008@umn.edu

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, MN  
Carlson School of Management  
Candidate for **Master of Business Administration**  
Emphasis: **Finance** – Funds Enterprise

May 2015

Bachelor of Science, Business and Management

## EXPERIENCE

BLACK RIVER ASSET MANAGEMENT, Hopkins, MN

Aug 2014 – Present

### Trading Intern

- Prepare weekly and monthly reports for hedge funds and private equity funds
- Working with portfolio managers and sales team to present material to current clients and prospects
- Prepare statements and work with internal relations in press releases, acquisitions and DDQs
- Work with sales team to achieve \$1.6 billion current year sales goal

BANK OF AMERICA – US TRUST, New York, NY

June 2014 – August 2014

### GWIM Summer Associate

- Was a part of various marine, aviation, real-estate, and portfolio loans that included a 40M dollar unsecured loan
- Worked with portfolio managers to construct Investment Policy Statements and portfolio allocation for different client needs, including \$100M dollar individual portfolio
- Participated in client facing meetings and phone calls to help facilitate different deal flow needs

KANATA PROPERTIES LLP, Edina, MN  
(Formally incorporated 2013)

May 2006 – Present

### Owner/Manager

- Analyze business performance using financial and statistical techniques to evaluate business trends and the effectiveness of strategic initiatives
- Developed accounting principals and tools used for company financial statements. Conduct all financial accounting activities including annual financial reports of company performance
- Research attractive real estate markets and market trends in both US and Canada for future expansion opportunities leading to the acquisition of successful properties in Calgary, AB and Minneapolis, MN
- Currently operate at a above 7% cap rate almost 2% above national average
- Negotiated purchase agreements on multiple properties in excess of 4M dollars
- Negotiated with lenders in both US and Canada to attain leverage at less than 4%
- Constantly assess current and potential property conditions to determine Capex improvements. Select contractors through bid process and successfully increased portfolio value by over 25%

CALGARY FLAMES, Calgary, AB, Canada

May 2006 – May 2011

### Professional Hockey Player

- First round 24<sup>th</sup> overall draft pick in the 2004 NHL Entry Draft, played 5 professional seasons
- Captain for Calgary's farm team in 2010, responsible for motivating and leading players, team cohesiveness and community involvement

# ALEXANDER DUWE

1800 Washington Ave S Minneapolis, MN 55454 (708) 217-9016 duwex001@umn.edu

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, MN  
Carlson School of Management  
Candidate for **Master of Business Administration**  
Emphasis: **Finance**  
GMAT Score: 750 (98<sup>th</sup> Percentile)

May 2015

UNIVERSITY OF WISCONSIN, Madison, WI  
Bachelor of Arts, Political Science

May 2010

## EXPERIENCE

THE PRINCETON REVIEW, Minneapolis, MN

August 2012 – Present

### **GMAT Instructor**

- Teach weekly GMAT Small Group Instruction Class with a goal oriented emphasis of increasing students' scores.
- Developed an ability to connect with students in the classroom, and was able to quickly identify their strengths and weaknesses.
- Raised students' scores on average between 100 to 200 points.

PURCELL AND WARDROPE, CHTD, Chicago, IL

August 2012 – July 2013

### **General Services Clerk**

- Filed legal documents with county, appellate, and federal court, and maneuvered a bureaucratic court system to file the documents in a timely manner.
- Organized office inventory and met with competing vendors to try and lower the overall cost of the office

SPECTRUM BRANDS, INC, Madison, WI

June 2010 – January 2012

### **Legal Intern**

- Assisted with multiple reorganizations and mergers by drafting legal agreements and company board minutes, and creating a database of the company's subsidiaries,
- Led and successfully completed a project to consolidate the company's state and franchise taxes saving the company money on state taxes.
- Worked with a team to outsource subsidiary tax work to an outside accounting agency.
- Analyzed state, federal and international laws and summarized depositions for corporate, litigation, and patent cases regarding the company

THE LABOUR PARTY, London, United Kingdom

June 2009 – August 2009

### **Labour Intern**

- Collected and analyzed voting data for the European Union and Parliamentary elections
- Participated in various policy meeting and fundraisers for the Labour Party.
- Recruited British citizens to join the Labour Party and encouraged them to vote in the upcoming election.

## ACTIVITIES

- Mentor, Minds Matter, August 2012-Present

# CHRISTOPHER J. ELFERING

2929 Chicago Ave, Unit 1012 · Minneapolis, MN 55407 · (612) 325-5644 · elfe0016@umn.edu

---

## EDUCATION:

UNIVERSITY OF MINNESOTA, Minneapolis, MN  
Carlson School of Management  
Candidate for **Master of Business Administration**  
Emphasis: **Finance**

May 2015

Bachelor of Arts in History, *summa cum laude*, Phi Beta Kappa  
GPA: 3.81/4.00

May 2004

## FINANCE EXPERIENCE:

THE MISSION CONTINUES, Minneapolis, MN

**Instructor, Financial Literacy**

January 2013 – July 2013

- Analyzed knowledge gaps and created a 6-class financial literacy curriculum to assist underprivileged members of South Minneapolis addressing financial statements, budgeting, debt, banking, and investing
- Taught personal finance classes to 163 community members through classroom and one-on-one instruction
- Implemented sustainable hiring and continuity practices to ensure program's continued success

AMERIPRISE FINANCIAL, Minneapolis, MN

**Financial Advisor**

July 2011 – February 2012

- Developed book of over 100 clients and maintained relationships through regular and effective communication
- Provided portfolio analysis and risk management guidance to diverse group of clients, addressing cash flow and liquidity, investment strategies, insurance policies, and estate planning
- Taught bonds and options classes to peers, which increased Series 7 pass rate for advisors-in-training by 35%

## MILITARY AND LEADERSHIP EXPERIENCE:

US ARMY, MN ARMY NATIONAL GUARD, Kirkuk, Iraq; Roseville, MN

**Company Commander/Military Advisor (Promoted to Captain)**

July 2007 – July 2010

- Served as senior logistics officer for an organization of over 1,100 individuals and equipment valued over \$80M
- Trained, assessed, and developed the employees of two Iraqi military organizations, resulting in 50% increase in transportation and 75% increase in crowd control capabilities
- Launched new training program for Iraqi mechanics, which increased vehicle operational readiness by 30%
- Communicated team's data to CEO-equivalent leaders through monthly presentations and regular meetings

US ARMY, Fort Drum, NY; Baghdad, Iraq

**Executive Officer (Promoted to First Lieutenant)**

December 2005 – July 2007

- Created, trained, and equipped unique cross-functional team responsible for efficient movement of supplies for 800-person strategic organization
- Designed and managed operations information center, responsible for mission/risk analysis, real-time operations management, and communicating with higher headquarters
- Planned, organized, and led over 550 successful individual projects, exceeding client supply chain needs

US ARMY, Fort Drum, NY

**Platoon Leader (Promoted to Second Lieutenant)**

June 2004 – December 2005

- Led and trained 48-person supply and transportation team
- Innovated a supply request tracking system, which resulted in a 50% increase in supplies received
- Researched and completed contracting packets of over \$500K in supplies and contract labor

## LEADERSHIP & COMMUNITY ENGAGEMENT:

- Board Member – Finance Club, Carlson School of Management, 2013
- Founder/President of University of Minnesota AUSA subchapter, dedicated to professional development of ROTC cadets and political involvement at the local and national levels, 2002 – 2003
- University of Minnesota Army ROTC: Pershing Rifles Drill Team, Color Guard, Mentor/Trainer/Evaluator to junior cadets, 2000 – 2004

# Jeremy (Ziyao) Gao

RM344 Stadium View 2508 Delaware St. SE, MN 55414 (612) 760-8198 gaoxx643@umn.edu

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, Minnesota  
Carlson School of Management  
Candidate for **Master of Business Administration**  
Emphasis: **Finance**

May 2015

DONGBEI UNIVERSITY OF FINANCE AND ECONOMICS, Dalian, China  
Bachelor of Economics  
Emphasis: **Financial Statistics (GPA: 3.7)**

Jun 2008

## EXPERIENCE

FUHOUCHUN BUSINESS MANAGEMENT CO. LTD, Kunming, China  
Co-founded Microcredit, Mortgage and Guaranty business, starting with \$8.7M and 5 employees. Company now has 7 subsidiaries and 112 employees, managing capital over \$81M.

### Risk Manager

May 2012 – April 2013

- Evaluated risk reports of credit business amounting to \$37M for three subsidiaries in different regions
- Led cross-functional team to conduct on-boarding evaluation surveys and identified potential risks
- Provided insights, recommendations, and other support and participated regular meetings held by Inner Credit Approval Association, which composed by only 7 administrative staffs

YUANHUI MICROCREDIT (a subsidiary of FUHOUCHUN), Kaiyuan, China

Nov 2011 – May 2012

### Deputy General Manager

- Explored potential market to expand business and achieved three new market entries, achieving 75% of capital for credit release within 6 months, compared to headquarters' target of 60%
- Researched niche industries and identified potential clients to introduce product portfolio resulting in development of business relationship with target clients
- Launched Water Donation for school children affected by severe drought, resulting in coverage by local media and increased brand recognition

HUALONG MICROCREDIT (a subsidiary of FUHOUCHUN), Kunming, China

Mar 2009 – Nov 2011

### Credit Manager

- Led cross-functional team to conduct on-boarding analysis on clients' operational and financial status and evaluated their debt paying abilities, achieving zero bad loans in both 2009 and 2010. Company was awarded as top 100 among 1425 companies evaluated by The People's Bank of China
- Innovated re-mortgage through buy-in and rare-right mortgage models, expanding client's base over 30%
- Managed and maintained relationships with 48 clients from 9 industries with credit amounting to \$10M
- Streamlined standard credit operational procedures to enhance the efficiency and effectiveness of communication across departments, achieving a saving of 10% operation cost
- Collaborated with software experts to formulate of Standard Microcredit Operational Online System, which had been adopted by 95% members of Microcredit Association of Yunnan Province by 2012
- Mentored 7 new employees to fully understand their responsibilities as credit analysts

HUAXIA BANK, Beijing & Kunming, China

Jun 2008 – Mar 2009

### Credit Analyst

- Analyzed financial statements and facilitated to approval of feasibility report of four project loans amounting to \$167M



# NICOLAS HORNS

3716 Kipling Avenue • Minneapolis, MN 55416 • (612) 310-1812 • horn0230@umn.edu

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, MN

Carlson School of Management

Candidate for Master of Business Administration

May 2015

*Ameriprise Financial Fellow*

Emphasis: **Finance**

UNIVERSITY OF ST. THOMAS, St. Paul, MN

Bachelor of Arts, Financial Management

May 2007

## EXPERIENCE

PROVENIRE CAPITAL, Minneapolis, MN

December 2013 – Present

### Research Analyst Intern

- Collaborate with the firm's portfolio manager to invest in long and short positions by utilizing fundamental research and equity valuation techniques to identify opportunities within the global technology, media, and telecommunications industries
- Develop and monitor financial valuation models for potential and existing investments, incorporating prospective revenue and earnings growth rates, the durability of a company's business model, and structural industry competitiveness
- Cultivate relationships with buy-side and sell-side peers and management teams to gain a better understanding of industries and specific companies

DRIEHAUS CAPITAL MANAGEMENT, Chicago, IL

June 2011 – July 2013

### Junior Trader

- Managed equity growth funds as a member of a 6-person collaborative investment team that focused on both domestic and international opportunities
- Actively sought liquidity by utilizing algorithmic trading and trading desks while trading micro-cap and small-cap mid-cap growth equities in the United States, Canada, and Latin America
- Analyzed current positions and potential investments utilizing fundamental and communicated ideas to portfolio manager and analysts

SOMERSET ASSET MANAGEMENT, Minneapolis, MN

December 2008 – June 2011

### Portfolio Assistant

- Developed a tactical asset allocation strategy with the chief investment officer that drove the firm's top-down investment process
- Researched companies for potential investment using fundamental analysis, following news developments and listening to earnings conference calls
- Managed the implementation of the portfolio accounting system and order management system

DEEPHAVEN CAPITAL MANAGEMENT, Minnetonka, MN

June 2007 – September 2008

### Treasury Associate

- Monitored and analyzed financing for the credit and derivative positions, seeking to reduce collateral requirements and increase financing efficiency
- Prepared cost of carry analysis for credit arbitrage and convertible arbitrage portfolio managers to understand position contribution to overall portfolio financing

## ACTIVITIES

- CFA Level II Candidate
- Carlson Funds Enterprise Portfolio Strategist

# LIANG HU

609 Huron Blvd SE Minneapolis, MN 55414 (612) 325-3716 hu.liangcn@gmail.com

---

## EDUCATION

### UNIVERSITY OF MINNESOTA. Minneapolis, MN

Carlson School of Management

Candidate for Master of Business Administration

May 2015

**Emphasis: Finance, Strategy**

Carlson Full-time MBA Scholarship

### NANKAI UNIVERSITY, Tianjin, China

Bachelor of Economics, Financial Engineering

June 2009

## EXPERIENCE

### CHONGQING EXPORT-IMPORT CREDIT GUARANTEE CO., LTD, Beijing & Chongqing, China

#### Senior Project Manager

June 2012 – July 2013

- Supported Director to establish Beijing Branch. Led the research of new business development, market positioning, and expansion strategy in North China, designed business development priority, focusing on capital market
- Responsible for developing partnership with financial institutions in north China region; penetrated with over 20 clients and initiated deals with 6 of them in first year.
- Developed and managed 9 new client relationships during first year; industries included pharmacy, automobile, chemistry, government, and agriculture
- Achieved \$150M guaranteed principal, \$2.4M fee income (80% revenue of Beijing Branch)
- Supervised 2 newly-joined employees, responsible for on boarding, training, project development, and performance assessment

#### Project Manager

July 2009 – June 2012

- Managed 25 investment projects in 5 provinces, responsible for analyzing projects, making recommendations, and executing projects.
- Led the evaluation of over 80 potential client companies through macro economy/industry analyses, financial modeling and field work; drafted reports and presented investment recommendations to management board
- Coordinated with over 20 external financial institutions to develop over 80 prospective client relationships; industries included non-ferrous metal, manufacturing, government, solar energy, and agriculture
- Led contract negotiation with client companies, external financial institutions, and internal departments. Responsible for projects' implementation, result, and risk control, and customer relationship management of 25 client companies
- Accomplished over 25 projects, with \$238M guaranteed principal, generated \$11M income (10% of total revenue of company)

### HUARONG SECURITIES, Tianjin, China

June –August 2008

#### Summer Intern

- Manage clients documents and information, assist manager to manage the client relationship
- Responsible for data collection and analysis, support analyst's industry research

## LEADERSHIP

School of Economics, NANKAI UNIVERSITY

September 2006 – June 2007

#### Vice Director, Student Union

- Interacted with and collected advice and suggestions from students, evaluated the applicability and proposed the implementation plans within Students' Union
- Organized annual chairman election of Students' Union in the School of Economics

# SYED FARAZ A. JAFRI

2508 Delaware Street SE Minneapolis, Minnesota 55414 (612) 2425485 jafri005@umn.edu

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, MN

Carlson School of Management

Candidate for **Master of Business Administration**

June 2015

Emphasis: **Strategy and Finance**

LAHORE UNIVERSITY OF MANAGEMENT SCIENCES, Lahore, Pakistan

BSc Honours, Economics

June 2009

*Dean's Honour List*

## EXPERIENCE

BANK ALFALAH LIMITED, Karachi, Pakistan

August 2011 – August 2013

### **Associate – Investment Banking**

- Managed key responsibility in origination and execution of Project Finance, Debt & Capital Market and Debt Restructuring transactions
- Structured debt financing transactions, including security structuring
- Arranged subordinated debt, commercial paper for institutional clients
- Performed financial and legal due diligence
- Arranged internal credit approvals for debt and investment transactions
- Managed relationship for corporate advances portfolio of \$140M and investment portfolio of \$4M
- Generated fee-based income of \$1M during 2012

BANK ALFALAH LIMITED, Karachi, Pakistan

February 2010 – August 2011

### **Analyst – Investment Banking**

- Performed economic and industry research
- Prepared financial projections
- Assisted Investment Banking Associate and Team Leader in execution of Debt & Capital Market transactions

BANK ALFALAH LIMITED, Karachi, Pakistan

August 2009 – February 2010

### **Management Trainee Officer**

- Use 2-5 bullet points to describe relevant experiences and accomplishments

## CERTIFICATIONS

- Chartered Finance Analyst
- May be eligible for charter after approval of work experience

## LEADERSHIP

- President of Bank Alfalah Travel Club, February 2010 – August 2013
- President of Academics Committee at Bank Afalah, August 2009 – February 2010
- Organizer and Master of Ceremonies of Bank Alfalah Clubs Carnival 2010
- Hostel Fellow at Lahore University of Management Sciences, December 2007 – June 2008

## ACTIVITIES

- Teaching Assistant of four (4) courses at Lahore University of Management Sciences

## SKILLS

- Knowledge of programming in C++ and Java
- Adept at statistical analysis in MS Excel, STATA and JMP

# MIN YOUNG KIM

1370 Carling Drive APT 209 · St. Paul, MN 55108 · (949)332-0161 · kimx4000@umn.edu

## EDUCATION

---

### UNIVERSITY OF MINNESOTA, Minneapolis, MN

Carlson School of Management

Candidate for Master of Business Administration

Emphasis: **Carlson Funding Enterprise(working as accountant)**

**July 2014**

### UNIVERSITY OF HANYANG, Seoul, KOREA

Bachelor of Business Administration

Emphasis: **Accounting and Financial Management**

**Feb 2003**

## EXPERIENCE

---

Samsung Electronics, Seoul, Korea

### Manager, Financial Management Group, IT Solution Division (PC & Printing)

**Mar 2011 - Present**

- Joined to taskforce team that dealt with investigation for taxable income by Korean Tax Service
  - justified exemption from taxation of development expense (US\$ 2 billion)
- Published forecast reports on budget allocation (US\$25 million/month): performed analysis and forecasting to facilitate core decisions on business operation

### Assistant Manager, Financial Management Team, IT Solution Division

**Mar 2003- Feb 2011**

- Developed Annual Management Plans and valued key management issues: handled investment planning and financial management worth US\$12 billion revenue, US\$2 billion cost, and US\$1 billion R&D budget
- Settled financial account of Computer System Division and reported directly to top management, spearheading 12 members as part-leader
- Performed profit analysis on products of competitors with over US\$1 billion in sales, such as Dell and Micron
- Monitored and managed affiliated companies' financial status: South America, Middle East and Africa
- Led a taskforce comprised of 4 members in constructing ROI and Cost Information & Simulation systems, deriving P&L formulas required for new business projection: recognized as benchmarking case in the company
- Acted as member of taskforce that devised NCI (New Cost Innovation System), a portal system for top management's access to key corporate indexes such as P&L, revenue, production, cost, and yield
- Participated in investigation team that analyzed and evaluated affiliated firm's business transparency: SESC/SSDP (China), SGE (Dubai), and SPRC (Poland)
- Supported the process of manufacturing plants establishment: development of material cost and license fee

## LEADERSHIP ACTIVITIES

---

### Sungjeon Association

**Mar 2003 - Present**

- Member, engaged in cooking and cleaning activities to support underprivileged seniors and orphans

### Young Korean Academy, Cheju, Korea

**Mar 1991 - Feb 1994**

- President, organized regular forums to discuss social issues and concepts of Modern Philosophy
- Participated in charity activities to serve free meals for orphans and disadvantaged children at local shelters

### Airforce, Yeachun, Korea

**Mar 1996 - Sep 1998**

- Served Military Service as MP (Military Police) for Korean Air Force for 30 months

## AWARDS

---

- Awarded *Best Performance* in Computer System Division, Samsung Electronics (2008)

# MATTHEW MALCOLM

2190 German St Maplewood, MN 55109 (651)792-6698 malco027@umn.edu

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, MN  
Carlson School of Management  
Candidate for **Master of Business Administration**  
Emphasis: **Finance, Accounting**

May 2015

UNIVERSITY OF SAINT THOMAS, Saint Paul, MN  
B.A., Economics, International Business, Spanish  
*cum laude*  
Study abroad program, September 2008-January 2009, Seville, Spain  
Language skills: Spanish (fluent)

May 2009

## EXPERIENCE

CARGILL, INC., Hopkins, MN

December 2009 – June 2013

### Payroll Specialist

November 2010 – June 2013

- Generated up to \$600,000 in annual savings for company through Electronic Pay project. Presented electronic paycard option and trained Spanish-speaking employees in its use at production locations. At conclusion of project, enrollment in electronic pay among Cargill employees surpassed 90%.
- Directed work of five interns through Cargill's rotational internship program for students with disabilities. Supervised intern projects including creation of Excel spreadsheets and documentation of department standard operating procedures.
- Processed exception-based Excel reports, computed wage payments and tax withholding, balanced earnings and deduction totals, prepared general ledger entries and tax data for corporate payroll of 50,000 North American employees

### Senior Bilingual Customer Service Representative

December 2009 – November 2010

- Collaborated with all levels of organization in providing customer service to internal employees.

BEST BUY CO., INC., Richfield, MN

May 2008 – August 2008

### Financial Analyst Intern

- Collaborated as part of finance team dedicated to international expansion into Mexico. Created MS Access database and Visio process diagrams to track property rent and maintenance expenses for Mexican store openings.
- Presented deliverables of real estate project to key stakeholders, and company implemented recommendations going forward.
- Championed intern-led project focusing on environmental product labeling (e.g. Energy Star) in Best Buy's US stores. Benchmarked competitors and analyzed cost-effectiveness of solutions. Presented recommendations to senior management at conclusion of project.

QUEBECOR WORLD, Bloomington, MN

June 2007 – December 2007

### Marketing Intern

- Conducted market research of fast-growing custom publishing market. Presented research paper to senior marketing management. Generated and qualified over 200 concrete sales leads of custom publishing companies for corporate sales force.

## LEADERSHIP/ACTIVITIES

- Graduate Business Career Center, First-Year Liaison at Carlson School of Management
- Carlson School of Management First-Year Ambassador, Full-time MBA Program
- Cargill United Way Team Captain, promoting employee participation and donations
- Co-founder and VP Finance of University of St Thomas Spanish Club

# HARSH MANKAD

Authorized to work in the U.S. (Green card holder)

2653 Rice Creek Road Apt 202, New Brighton, MN 55112 • Cell: 651.285.7280 • [mank0018@umn.edu](mailto:mank0018@umn.edu)

---

## EDUCATION:

UNIVERSITY OF MINNESOTA, Minneapolis, MN

Carlson School of Management

Candidate for **Master of Business Administration**

May 2015

GPA: 3.72/4.00

**Bachelor of Arts in Economics**

May 2012

Dean's List, GPA: 3.81/4.00

Pursued professional tennis career on the ATP World Tour after achieving #1 ranking in NCAA tennis in junior year.

## EXPERIENCE:

Cargill, Wayzata, MN

June 2014 – Present

### Corporate Brand Management Intern

- Managed key component of Cargill's corporate brand extension by developing its 150th anniversary's 150 stories project, which involved the creation of 150 stories highlighting how Cargill has helped its partners thrive.
- Strategically mapped out the process for the 150 stories project: coordinated efforts, consolidated edits among a cross-functional Cargill team, managed communication, and aligned Cargill team with external creative agency.
- Formed partnerships with Business Unit and Corporate Account Leaders to gather all relevant information to support the stories and gain all approvals for external display of stories in an anniversary book and on Cargill.com.
- Reduced process time for stories to completion by 33% by consolidating different stages in the process, effectively communicating with all stakeholders, and meticulously submitting project deliverables on established timelines.
- Aligned 150<sup>th</sup> merchandise catalog goals to the capabilities of merchandise sourcing partner and creative agency.

Funds Enterprise, Carlson School of Management, Minneapolis, MN

February 2014 – Present

### Economist and Stock Analyst

- Presented strategic economic updates on a monthly basis to growth fund analysts highlighting key changes in the US economy. This presentation provided the basis for future investment decisions for the over \$18 million equity portfolio.
- Developed strategy to manage over \$800K investment in Boulder Brands Inc. focused on long-term growth in the gluten free foods segment. This strategy provided consistent returns through a turbulent Q1 2014 for the company.

GOLDEN VALLEY GOLF AND COUNTRY CLUB, Golden Valley, MN

February 2012 – October 2013

### Director of Tennis Academy

- Created strategic plan for academy focused on quality of services and flexible options, leading to \$150K in revenue in 2 seasons beating expectations by \$30K.
- Managed the P&L of tennis academy and reduced variable costs attributed to labor and equipment by 30% in year 2 compared to year 1, improving profitability of the business without compromising service quality.
- Built strong relationships with customers by providing value-added services originating from consumer insights through qualitative feedback and quantitative analysis.
- Led a cross-functional staff of 15 and achieved less than 10% staff turnover from year 1 to year 2 and over 95% retention of customers over the same period.

ATP World Tennis Tour, Global

May 2002 – October 2010

### Professional Tennis Player

- Achieved a career high singles ranking of 220/1500+ and doubles ranking of 102/1000+ as a result of long-term strategic planning, sustained effort to achieve goals, and ability to deliver results in highly competitive conditions.
- Qualified and competed in the main draw at Wimbledon in 2010, which is the highest stage in world tennis.
- Represented India on a world stage in Davis Cup competition becoming an ambassador for the nation.
- Travelled to over 50 countries gaining a unique international perspective and cross-cultural teamwork skills.

## LEADERSHIP:

- Elected President of the MBA Global Business Student Association.

March 2014

- Elected by MBA class to be Cohort Representative to the Carlson MBAA Board.

September 2013

# QUYEN NGUYEN

747 Buchanan NE Street Minneapolis, Minnesota MN 55413 612 636 3792 nguy2254@umn.edu

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, MN  
Carlson School of Management  
Candidate for **Master of Business Administration**  
*GMAT: 740 (97%)*

May 2015

FOREIGN TRADE UNIVERSITY, Ho Chi Minh City, Vietnam  
Bachelor, International Business Economics  
*Distinction*

August 2010

## EXPERIENCE

INTEL CORPORATION, Vietnam  
**Risk Management Analyst**

October 2010 – July 2013

- Core-team member of annual company-wide risk assessments. Coached department representatives on risk assessment methods and reviewed risk grades/mitigation plans
- Conducted quarterly audits on operational processes to ensure compliance with accounting/customs policies and internal controls requirements
- Led 2 cross-functional projects to ensure customs compliance. Acted as risk consultants on SoC product readiness project
- Founded “Site Controls forum” and actively contributed to “Worldwide Assembly & Tech Risk Management Forum”
- Achieved “Exceed Expectation” performance review in 2011/2012. Promoted to **Senior Risk Management Analyst** in March 2013

BAO MINH INSURANCE CORPORATION, Vietnam  
**Data Analytics Intern**

March 2010 – June 2010

- Developed S.A.S program to calculate nationwide insurance revenue/claim in non-life insurance products and analyze the correlation of customer traits. The program was sustained to generate monthly reports to Board of Directors to evaluate corporate risk profile

## ACTIVITIES

INTEL TOASTMASTER CLUB  
**Vice President of Membership**

September 2011 – September 2012

- Led 2 membership recruiting cycles and maintained ~ 30 members. Tracked membership involvement and book-keeper
- Co-organized 2012 “Annual Toastmaster Contest”. Finalist of 2011 Contest.

EDUCATION FOR CENTER DEAFNESS  
**Translation Volunteer**

June 2011 – September 2012

- Assisted CED Director in translating the book “How to live with deafness”

## HONORS & AWARDS

- Carlson MBA Dean Merit Scholarship (2013)
- CFA Access Award Scholarship (2013)
- TNT Excellence Scholarship (2008)
- 1st Personal Prize in “The Future Economist Contest” (2008)

# TODD OLIN

6795 East River Road • Fridley, MN 55432 • (612) 986-6256 • olin0021@umn.edu

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, MN

Carlson School of Management

Candidate for **Master of Business Administration**

May 2015

GMAT: 750/800; Dean's Fellow; Carlson Growth Fund, Compliance and Regulatory Manager

The Law School

Juris Doctor

May 2007

*Magna Cum Laude*

Institute of Technology

Bachelor of Science in Mechanical Engineering

May 2002

*Summa Cum Laude*

## EXPERIENCE

XETEX, Coon Rapids, MN

October 2008 – August 2013

**Mechanical Engineer and In-House Attorney**

- Created and independently led a 10-member team that developed a new heat pump product, which in its first year led to \$900K in sales (10% of total company sales)
- Developed and implemented a strategy to minimize tax liability for sales in multiple states, saving the company thousands of dollars per year
- Negotiated with state government agencies to achieve certification as a disadvantaged business enterprise, increasing the number of government contracts awarded to the company
- Served as secretary of the engineering steering committee, continuously reviewed corporate strategy and allocated resources to research and development projects

NORWEGIAN UNIVERSITY OF SCIENCE AND  
TECHNOLOGY, Trondheim, Norway

August 2007 – June 2008

**Fulbright Scholar**

- Created an energy policy research project proposal and secured resources to pursue it under the Fulbright program
- Collaborated with seven Norwegian professors and private sector scientists to explore the relationships between 10 different energy technologies, patterns of American energy consumption, and the effect on energy security, the environment, public health, national security, and the economy
- Presented data and analysis to the NTNU faculty, other Fulbright scholars, and the American Ambassador to Norway

## LEADERSHIP

MBA ENERGY CLUB, Founder, President

November 2013 – Present

- Assembled a team of fifteen Carlson School MBA students to participate in organizing club activities
- Led club efforts to host a speaker series focused on energy topics

CITY OF FRIDLEY ENVIRONMENT AND ENERGY COMMISSION, Chairman

April 2011 – Present

- Presided over and set agendas for regular commission meetings
- Negotiated a new contract with waste haulers for economical, city-wide recycling service
- Advocated for homeowners in commission proceedings held in response to a train derailment

BANFILL-LOCKE CENTER FOR THE ARTS, Director

March 2011 – Present

- Prepared the necessary documentation to establish an art center endowment
- Organized a sustaining membership program for art center donors



# ANDREW L. PETERSON

3041 Holmes Ave. S., Minneapolis, MN 55408 · mobile (763) 300-2745 · pete5982@umn.edu

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, Minnesota

Carlson School of Management

Candidate for **Master of Business Administration**

May 2015

GPA: 3.69/4.00; GMAT: 730/800 (96<sup>th</sup> percentile)

Dean's Fellowship Recipient – Full Tuition Coverage

ST. OLAF COLLEGE, Northfield, MN

Bachelor of Liberal Arts in **Mathematics** and **Chemistry**

December 2009

Dean's List, GPA: 3.57/4.00, Mathematics: 3.79, Chemistry: 3.55

## EXPERIENCE

GRUPO LEDERGERBER, Guayaquil, Ecuador

June 2014 - Present

### Summer Intern

- Develop market entry strategy for asset management firm's launch of national convenience store chain.
- Research existing stores, both domestically and abroad, to identify customer specifications and industry best practices.

CARLSON FUNDS ENTERPRISE, Minneapolis, MN

March 2014 - Present

### Trader

- Execute trades for the Carlson Fixed Income Fund, a student-run portfolio managing over \$18MM in assets.
- Collaborate with brokers to solicit offer and bid requests.
- Analyze broker quotes, yield curve changes, and additional credit information using Bloomberg and Factset.
- Produce post-trade portfolio reports for colleagues.

HEALTH CARE FUTURES, LP, Edina, MN

June 2010 - May 2013

### Business Associate (Consultant)

- Assessed competitive positioning of health systems, hospitals, and physician practices.
- Analyzed hospital and physician office reimbursement trends and revenue streams; identified and recommended strategic opportunities.
- Developed business plans, physician compensation models, and strategic plans for a broad range of health care organizations.
- Worked cross functionally with physicians and executive management to achieve project goals.
- Presented analyses and recommendations to executive management and physician leadership.

### Highlights

- Developed business case for the regional health system acquisition of a 50 physician, \$35MM multispecialty group; assisted with development of resulting compensation plan and served as mediator between health system and physician group senior executives to ensure interests of both parties were included in process deliverables.
- Created incentive-based compensation plan to reward physicians for excellence in clinical quality and patient experience while maintaining financial alignment with today's volume-based reimbursement environment; plan adopted by 1,400 physician, \$750MM health system.
- Designed a regulatory review process to quantify impact of regional commercial insurance contracts on physician compensation, including impact on fair market value and commercial reasonableness; process instituted by 1,500 physician, \$800MM health system.
- Established physician partnership strategy for health system by leveraging patient-level data, internal financial reports, and third-party demographics study.
- Constructed regression model to weigh primary care physician supply, inpatient utilization rates, and health status indicators in order to identify geographic areas lacking access to cardiovascular services.
- Completed physician production and compensation profiles for more than 4,000 physicians, representing over 50 subspecialties.

## TECHNICAL SKILLS

Proficiency with Excel macros (VBA) and the statistical computing program R.

# SVETLANA SANDBERG

6408 Timber Ridge Drive • Edina, MN 55439 • (612) 655 1347 • [sandb224@umn.edu](mailto:sandb224@umn.edu) • US citizen

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, MN  
Carlson School of Management  
Candidate for **Master of Business Administration**  
Emphasis: **Finance, Carlson Funds Enterprise**  
3.747 GPA

May 2015

VOLGA FEDERAL UNIVERSITY, Kazan, Russia  
Bachelor of Arts, International Relations  
4.0 GPA

June 2007

## EXPERIENCE

Wells Capital Management

June 2014 - Present

### **Taxable Money Market Credit Research Analyst, Intern**

- Prepare Corporate Credit review by completing detailed financial valuation and qualitative analysis.
- Perform industry research on market development and competitors using internal and external resources.
- Partner with WCM analysts to complete review of potential investment target funds for \$150 bil portfolio.
- Analyze stability of the investable universe valuation at Wells Capital Management, S&P and Moody's.
- Research effects of recent changes to the 2a-7 rule on Wells Capital Management investment strategy and Money Market industry by meeting with City Bank strategist and WCM Portfolio Managers.
- Participated in the Invest MN Conference on behalf of Wells Capital Management.

Sybaritic, Inc.

May 2008 – October 2014

### **International Account Manager**

- Developed and implemented strategic territory growth plan to expand company sales by 80%.
- Negotiated exclusive territory agreements with new and existing customers to increase company margins by 8%.
- Developed marketing tools and conducted product training at international events to increase awareness and build understanding of the company brand.
- Analyzed marketplace and individual account trends to prepare accurate monthly and annual sales forecasts and period end financial statements for successful just-in-time manufacturing model.
- Took initiative to create new processes of order release and product quality check to optimize overall customer experience.

Department of International Affairs, Kazan, Russia

June 2003 – Feb 2008

### **Interpreter**

- Led interpreter team by creating clear vision and participation goals for each team member on overseas assignments during bidding to host University Olympics 2013 in Kazan.
- Interpreted for the President, Mayor and other senior level governmental officials and foreign delegations during complex negotiations domestically and overseas, achieved superior client satisfaction.
- Prepared high-level plans for international conferences on political, economic, social, technical, and scientific matters.

## LEADERSHIP AND SKILLS

- Winner of National Healthcare (Apr 2014) and Medtronic Interdisciplinary Case Competitions (Nov 2013)
- Managing Director of the Carlson Growth Fund (March 2014 - Present)
- President of the MBAWI and VP of the Carlson Finance Club (March 2014 - Present)
- Completed LBO and DCF valuation courses from Wall Street Prep (March 2014)
- Womensphere Emerging Leaders Global Summit Delegate from Carlson (January 2014)

# JOSEPH STORMONT

1792 Stanford Avenue • Saint Paul, MN 55105 • (651) 249 3288 • storm158@umn.edu

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, MN  
Carlson School of Management  
Candidate for **Master of Business Administration**  
Emphasis: **Finance**

May 2015

COLUMBIA UNIVERSITY, New York, NY  
Bachelor of Arts, Economics and Operations Research

June 2011

## EXPERIENCE

THE HARTFORD FINANCIAL SERVICES, Multiple U.S. Locations  
*Leadership Development Program sponsored by The Hartford's Internal Consulting Division*

**Divestiture Team**, Minneapolis, MN

September 2012 – July 2013

Senior Analyst

- Represented The Hartford's Divestiture Team to acquiring companies in pre/post-close integration; managed relationships with AIG, Prudential, and Mass Mutual teams
- Developed Excel-based tools to automate reporting and analysis for Divestiture Team
- Led effort to research interfaces between 206 financial systems for use in formation of separation strategy

**Enterprise Sourcing Strategy**, Hartford, CT

July 2011 – September 2012

Analyst

- Designed and executed executive level reporting for \$338M annual contract value sourcing portfolio
- Created and pitched vendor performance metrics; used by executives in fixed-fee contract negotiations
- Developed financial stability scorecard for international suppliers that followed S&P methodology
- Managed relationships with four research & advisory firms; initiated relationship with Duke Fuqua Schools' Offshoring Research Network, positioning The Hartford for Founding Member status
- Chosen from national group young professionals to speak at The Hartford's Career Development Forum

**Woodbury Financial Broker/Dealer**, Woodbury, MN

July 2010 – September 2010

Summer Analyst

- Assisted in merger with Diversified Financial Concepts Inc; analyzed client portfolios and assigned those clients to financial representative based on portfolio size and risk tolerance
- Managed data feeds from investment advisors and communicated with vendors to ensure accuracy
- Created a pro-forma analysis of recruiting process – identified opportunity to save \$22k in 2010

LAKE ELMO BANK, Lake Elmo, MN

May 2009 – August 2009

**Commercial Banking**

Summer Analyst

- Analyzed loan draw requests and project financing, both residential and commercial
- Reviewed invoices with project foremen and reconciled with loan draw requests

## LEADERSHIP AND ACTIVITIES

- Carlson Finance Club Board Member
- City of Hartford Math Tutor
- Columbia Athletic Department Community Outreach Lead
- Division I Varsity Football

October 2013 – Present  
July 2011 – September 2012  
September 2009 – June 2010  
August 2007 – June 2009

# ROB TINKHAM

204 9<sup>th</sup> Ave N, Apt #308 · Minneapolis, MN 55401 · (952) 212-3396 · tinkh010@umn.edu

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, Minnesota

Carlson School of Management

Candidate for **Master of Business Administration**

Emphasis: **Finance**

GMAT: 740 (Top 2% Globally)

*Dean's Fellow Scholarship Recipient (Full Merit-Based Scholarship)*

May 2015

*Charter Financial Analyst (CFA) Program:* Passed all three levels on first attempt and will be eligible for the CFA Charter upon completion of required work experience.

UNIVERSITY OF WISCONSIN-MADISON, Madison, WI

Bachelor of Business Administration, Finance

GPA: 3.6/4.0

May 2009

## EXPERIENCE

VALSPAR CORPORATION, Minneapolis, MN

May 2014 – August 2014

### **Corporate Finance Intern**

- Conducted due diligence on potential acquisitions, including market research, financial modeling/valuation and risk analysis to improve management's understanding benefits/risks of acquisition.
- Analyzed potential commodity hedging program and gave recommendations to management on hedging strategy.
- Increased management's understanding of previous acquisition's performance in order to improve due diligence process for future acquisition analyses.

NORTHLAND SECURITIES, Minneapolis, MN

April 2012 – April 2013

### **Equity Research Analyst**

- Drove incremental revenue to the company via uncovering unique investment insights (primarily within the digital media, internet and advertising sectors), through building proprietary models, market research, and analysis of material news.
- Discovered new investment opportunities and wrote initiation reports on the related company, through the evaluation of long-term business prospects, market opportunities, financials, relative valuation and risks.
- Increased client and company understanding of investment hypotheses through daily presentations of research findings and investment theses to institutional sales/trading team, hedge funds and mutual funds.
- Improved firm and client knowledge of researched company's financials and long-term business prospects through the development of financial models based on analysis of research, micro and macro economic factors, management guidance and management discussions.

NORTHERN TRUST, Chicago, IL

April 2011 – April 2012

### **Securities Pricing Analyst**

- Enlarged company's revenue base via leading the onboarding of large client with customized pricing needs. Implemented new pricing policies, answered client inquiries and participated in monthly conference after successful transition to ensure continued client satisfaction.
- Ensured accuracy of fixed income and equity prices provided to clients in order to maintain company's brand of consistency through constant communication with Investment Managers and our vendors.
- Improved overall team productivity and performance by implementing more efficient controls system and streamlining various processes.

CARLSON MARKETING, Plymouth, MN

March 2010 – April 2011

### **Financial Analyst**

- Increased business unit's understanding of company performance by interpreting financial results of month and year-to-date performance of IT and contact center business units and presented findings to senior management.
- Drove increased transparency of cost drivers via the development of a new budgeting and forecasting system.

## ACTIVITIES

- Awarded 2<sup>nd</sup> place out of 250 teams at 2014 National Investment Banking Competition
- Passed the Series 7, 63 and 87 certification examinations
- Portfolio Strategist for Carlson Funds Enterprise

# DAVID UNHJEM, CFA

1800 Washington Ave. S #205 • Minneapolis, MN 55454 • (701) 793-7022 • unhje004@umn.edu

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, MN

Carlson School of Management

Candidate for **Master of Business Administration**

May 2015

Emphasis: **Finance and Strategic Management**

**Dean's Fellow Award**

Cumulative GPA: 3.83

BOSTON COLLEGE, Chestnut Hill, MA

Bachelor of Arts, Economics and Mathematics

May 2008

## EXPERIENCE

DISH NETWORK, Englewood, CO

June 2014 – Present

**MBA Intern – Financial Planning & Analysis**

- Developed a subscriber profitability model to coincide with a new view on customer segmentation
- Analyzed new credit score threshold's impact on subscriber economics and presented findings to company executives
- Performed ad hoc analysis for the international sales team regarding a promotional offer targeting the Japanese customer base

OLD MUTUAL ASSET MANAGEMENT (OMAM), Boston, MA

September 2011 – June 2013

**Associate Investment Analyst – Investment Strategy & Business Development**

- Coordinated a cross-functional portfolio review which selected five underperforming affiliates to be sold via MBO, which increased annual EBITDA margins from 24% to over 33%
- Analyzed OMAM's \$250b investment portfolio and identified attractive segments to direct the firm's acquisition strategy
- Conducted investment screens, produced in-depth due diligence on acquisition targets, and presented information decks to OMAM's executive team
- Evaluated new product proposals and seed capital requests, providing recommendations to the Seed Capital Committee
- Identified and eliminated over \$500,000 in annual expenses after reviewing and amending existing vendor service agreements
- Coordinated and led monthly portfolio review meetings with OMAM's five-member executive team

RBC WEALTH MANAGEMENT, Minneapolis, MN

December 2008 – June 2011

**Team Lead – Corporate Actions**

- Advised RBC's network of financial consultants on M&A items affecting client portfolios
- Provided initial training and coaching for five new associates as the team expanded
- Supervised new offer initiation prior to distributing offer materials to RBC's network of financial consultants and proprietary arbitrage accounts
- Selected to RBC's "Premier Service Group" which works with RBC's top financial consultants

## LEADERSHIP AND STUDENT ACTIVITIES

- Carlson Funds Enterprise, Small Cap Growth Fund – Portfolio Strategist, Steering Committee member
- NIBC Case Competition, 2<sup>nd</sup> Place – MBA Division
- Elite Eight Case Competition, Managing Partner
- MBA Finance Club, Vice President

# IAN WILLIAMSON

170 Charles Avenue Saint Paul, MN 55103 (619) 708-8434 will4601@umn.edu

---

## EDUCATION

UNIVERSITY OF MINNESOTA, Minneapolis, MN  
Carlson School of Management  
Candidate for **Master of Business Administration**  
Emphasis: **Finance**

May 2015

UNIVERSITY OF WISCONSIN, Madison, WI  
Bachelor of Science, Mathematics

May 1993

## EXPERIENCE

CARRIER STRIKE GROUP ONE, San Diego, CA

January 2012 – July 2013

### **Force Protection Officer**

- Directed security team planning and implementing multi-ship international port visits in UAE, India and Australia ensuring safety of over 5,000 personnel with zero security incidents.

U.S. SPECIAL OPERATIONS COMMAND, Ottawa, Canada

December 2008 – December 2011

### **Special Operations Liaison Officer**

- Created new U.S. international liaison position with Canada's special operations forces, establishing model for success. Requested by name to create formal liaison position with France's special operations forces earning personal award for achievement.
- Advised U.S. Ambassador and U.S./Canadian military commanders during bilateral collaboration for major security events including Vancouver 2010 Olympics and G8/G20 Summits.

JOINT SPECIAL OPERATIONS COMMAND, Fayetteville, NC

August 2006 – November 2008

### **Intelligence, Surveillance, and Reconnaissance**

- Tracked development and combat validation of \$75.3M unmanned airborne vehicle program.
- Successful fielding of system ahead of schedule led to \$153M in additional funding and personal selection to Secretary of Defense Intelligence, Surveillance, and Reconnaissance Task Force.

FLEET AIR RECONNAISSANCE SQUADRON TWO, Oak Harbor, WA

December 2004 – July 2006

### **Maintenance Department Head**

- Led over 300 personnel performing management, administrative and production efforts of organizational level maintenance on 11 aircraft with \$20M budget.
- Assumed role with 8 of 41 programs "off track" from last inspection. Preached best practices and "by the book" maintenance, emphasized training and increased qualifications by 49%. Resulted in flawless inspection recognized as "best in last two years" out of six squadrons.
- Audited government purchase card eliminating \$100K in redundant charges and scrutinized material readiness lists reducing lost equipment by 79%. Resulted in total savings over \$1M.

NAVAL STRIKE AND AIR WARFARE CENTER

July 2002 – August 2004

### **Weapons and Tactics Instructor**

- Provided graduate level training on tactics, techniques and procedures to Navy aircrews in classroom lectures, one-on-one training and large integrated exercises.

FLEET AIR RECONNAISSANCE SQUADRON TWO, Rota, Spain

January 2000 – May 2002

### **Assistant Operations Officer**

- Managed utilization of six aircraft and scheduling of 160 personnel executing airborne reconnaissance and training operations at four globally dispersed locations.

# Undergraduate Students

# Edward Davis

[Edward.Davis-jnr@ucdconnect.ie](mailto:Edward.Davis-jnr@ucdconnect.ie) 001 612 9637 431  
Longstone, Ballymore Eustace, Naas, Kildare, Ireland

## Education

**Bachelor of Civil Law with Economics** 2012-2016

Sutherland School of Law, University College Dublin, Ireland

- UCD Entrance Scholarship – received based on academic excellence
- First Class Honours - Expected
- International Exchange Scholarship - awarded scholarship to the University of Minnesota for the 2014/2015 academic year

**Irish Leaving Certificate** 2009-2012

Naas CBS, Kildare, Ireland

- Attained 545/625 points, 97<sup>th</sup> percentile
- Subjects taken: Mathematics, Economics, English, Chemistry, Biology, French and Irish
- Naas CBS Excellence Award, recognising my commitment to the school and my studies

## Work Experience

**Clyde & Co, St Botolph Building, London** June 2014

- Summer Internship within the Corporate Team
- Completed independent research, analysis and commentary of the law in response to client’s needs
- Drafted documents, reviewed contracts and attended client meetings
- Developed my understanding of the legal system and what a career in law entails

**J.P. Morgan, Canary Wharf, London** April 2014

- Spring Insight Programme specific to sales, trading and research
- Developed practical skills and technical knowledge through desk rotations across equity research, FX real money sales and equity sales trading
- Applied knowledge gained by presenting project on EU rates to panel of senior managing directors

**Morgan Stanley, Canary Wharf, London** March 2014

- Spring Insight Rotational Programme consisting of divisional overview sessions, interactive workshops and work shadowing placements
- Gained invaluable insight into an investment bank’s business model and how different divisions interact
- Developed teamwork, time-management and presentation skills through case studies, skill sessions and a group project

**UCD Student Managed Investment Fund** September 2013-Present

- Organise weekly meetings to discuss market movements and identify potential investment opportunities
- Educate incoming analysts on value investing within the sector and the structure of the fund
- Review analysts’ research and coordinate the pitches of stocks selected for review by the executive board

**Granvilliers Tourist Office, France** June 2011-September 2011

- Employed as an English-French translator for the tourist office to assist in public relations and sales
- Developed French skills and fostered an appreciation of other cultures, giving me an international outlook

## Volunteer Experience

**UCD Volunteer Overseas, Tanzania, Africa** January 2013-Present

- Volunteered in Tanzania, Africa in the summer of 2013
- Coordinated English classes and developed I.T. skills of secondary school pupils
- Redecorated classrooms with educational murals

**Volunteer Tutor with UCD Access Scheme** September 2013-December 2013

- Provided academic support to underprivileged leaving cert students in St.Johns College, Ballyfermot on a weekly basis
- Prepared lesson plans, taught study skills and communicated the importance of effective revision
- Motivated students to attend third level education

**Best Buddies, Naas, Kildare, Ireland** September 2009-June 2012

- Provided peer support to mentally and socially challenged children
- Organised events such as cinema and bowling trips with the aim of improving their social skills and helping them to mix with peers

## Awards and Activities

University College Dublin

- **UCD Harvard Model United Nations delegate**, debated and resolved important global issues with students from universities around the world
- **Winner of Morgan Stanley M&A competition 2013**, advised directors in responding to a hostile takeover bid
- **Undefeated in the UCD Vivian Lavan Maidens Moot 2012**, winning 4/4 moots
- **UCD Investors and Entrepreneurs Society Committee Member**, enhancing my knowledge of the financial industry and giving me an insight into the world of investment banking, sales and trading and management consultancy

Naas CBS, Kildare

- **School Prefect**, responsible for maintaining the school’s library
- **Student Council member**, liaised with students and staff to address issues in the school
- **Gaisce Presidents Award**, for community involvement, development of personal skills and physical recreation on a weekly basis
- **Scholarship to Université D’été, France**, summer school hosted in the Paris region attended by European students
- **Captained Naas CBS senior football team**, fostered cooperation, communication and competitiveness amongst teammates
- **Captained Naas CBS French debating team**, coordinated training sessions and workshops
- **Irish Defence Forces Leadership Programme**, 3 day combat simulation to foster leadership, teamwork and communication skills

## Skills

- Completed Bloomberg University Training Programme at UCD
- Working Knowledge of MS Office



# Mathieu Froment

1301 University Avenue SE, Apt. 524  
Minneapolis, Minnesota 55414  
from0056@umn.edu  
(612) 227-0134

---

## EDUCATION

**University of Minnesota**  
Curtis L. Carlson School of Management  
Bachelor of Science in Business  
Major in Finance and Risk Management Insurance, Minor in Accounting  
GPA: 3.88  
Dean's list all semesters

**Minneapolis, MN**  
**Graduation May 2015**

---

## EXPERIENCE

**Carlson School of Management Funds Enterprise**  
*Undergraduate Student Analyst*

**Minneapolis, MN**  
**Admitted November 2013-Present**

- Manage \$35 million in combined assets comprised of a small cap growth fund and a fixed income fund
- Improve valuation and fund management techniques through work with faculty and MBA students

**Banque de Luxembourg**  
*Fund Transfers Coordinator*

**Luxembourg City, Luxembourg**  
**June 2013**

- Analyzed data received from personal bankers to generate actionable information
- Determined feasibility of transactions by evaluating customers' accounts and assessing risk
- Utilized European payment system Target2 to process interbank transfers

**Montbeliard Tennis Club**  
*Tennis Camp Instructor*

**Montbeliard, France**  
**July 2011-August 2011**

- Assessed the skill levels of more than 20 players and created individual development plans
  - Applied interpersonal skills to establish strong relationships with both players and parents
- 

## INTERCOLLEGIATE ATHLETICS

**University of Minnesota, Division I NCAA Tennis Team**

**September 2011-Present**

- Acquired strong time management skills by balancing a full academic schedule with athletics
  - Academic All Big Ten 2012, 2013, Big Ten Distinguished Scholar Award 2013
  - Bob McNamara Unsung Player of the Year Award 2013
- 

## LEADERSHIP AND COMMUNITY SERVICE

**Student Athlete Advisory Committee (S.A.A.C)**  
*Tennis Team Representative*

**Minneapolis, MN**  
**January 2012-Present**

- Proposed, developed and implemented policies and procedures pertinent to the success of the University's student-athletes
- Organized and made decisions regarding major student-athlete events

**HopeKids Festival**  
*Volunteer*

**Minneapolis, MN**  
**September 2011, 2012, 2013**

- Headed a "rock and roll" station to entertain 100 children living with cancer
- Interacted with children and their parents to create a memorable experience

**InnerCity Kids**  
*Volunteer*

**Minneapolis, MN**  
**November 2011, November 2012**

- Taught tennis to 15 children who do not have regular access to sports facilities
- Used status as a Division I athlete to reinforce values such as hard work and integrity

# Eric C. Frueh

1301 University Ave. Apt. 524  
Minneapolis, MN 55414

frue0037@umn.edu  
(507) 398 5748

---

## EDUCATION

### University of Minnesota

Curtis L. Carlson School of Management

Candidate for Bachelor of Science in Business, Finance and Accounting

GPA: 3.66

*Relevant Coursework: Finance Fundamentals, Financial Markets and Interest Rates, Principles of Corporate Finance, Financial Modeling, Security Analysis, Options and Derivatives, Portfolio Management, Intermediate Accounting I & II*

Minneapolis, MN  
May 2015

---

## EXPERIENCE

### Piper Jaffray Companies

*Investment Banking Summer Analyst*

Minneapolis, MN  
Begins June 2014

### Carlson School of Management Funds Enterprise

*Undergraduate Student Analyst*

Minneapolis, MN  
Admitted November 2014-Present

- Manage \$35 million in combined assets comprised of a small cap growth fund and a fixed income fund
- Oversee all operational aspects of respective fund, including portfolio management, marketing, client relations, media relations and performance reporting
- Research asset classes to make buy/sell recommendations according to investment guidelines

### Baseline Tennis Center

*Adult and Junior Drill Coordinator*

Minneapolis, MN  
May 2012-Present

- Improve skill levels of over 250 juniors and 50 adults by analyzing strengths and weaknesses in order to provide highly specific training
- Coordinate with fellow instructors to determine best practices for training in order to improve overall staff performance

### Coach for College

*Marketing Coordinator*

Minneapolis, MN  
September 2013-Present

- Promote and plan volunteer/study abroad trips available to student-athletes nationwide through Coach for College
- Increase student awareness through formal presentations, tabling efforts, social media, and personalized Skype conversations

### Nike Tennis Camp

*Camp Co-Director*

Minneapolis, MN  
June 2013

- Organized the production of three week long tennis camps with 70+ kids each week
- Worked 75 hours a week by coaching 7am-5pm followed by leading overnight activities until 10pm
- Constructed excel templates to be used in future years in order to better organize the camp

---

## INTERCOLLEGIATE ATHLETICS

### University of Minnesota, Division I NCAA Tennis: Captain

Minneapolis, MN  
2011-Present

- Developed time management skills through balancing a full academic schedule while allocating 20+ hours/week to athletics
- 2013 Big 10 Distinguished Scholar and 2012 and 2013 Intercollegiate Tennis Association Scholar-Athlete

---

## LEADERSHIP AND COMMUNITY SERVICE

### Coach for College

*Volunteer in Vietnam*

Hau Giang, Vietnam  
July 2013-August 2013

- Served as a sports coach, academic teacher, and life-skills instructor to over 100 underprivileged students in rural Vietnam
- Completed an independent study program about the cultural implications on the scaffolding teaching philosophy
- Received award for "Best Sport's Coach" among 15 other instructors

### Investment and Finance Organization

*Club Member*

Minneapolis, MN  
September 2013-Present

- Attend multiple meetings each month in order to learn more about investment banking and future opportunities
- Help facilitate conversation between students and investment banking professionals

### Student Athlete Advisory Committee

*Tennis Team Representative*

Minneapolis, MN  
January 2012-Present

- Actively address policies and procedures that pertained to student athletes
- Organize events throughout campus including the Hope Day Festival and the "Golden Goldy's"

# IAN GOODWIN

2975 Casco Point Road | Wayzata, MN 55391 | 952-334-2424 | goodw140@umn.edu

## EDUCATION

---

### University of Minnesota, Curtis L. Carlson School of Management

Bachelor of Science in Business

May 2015

Majors: Finance, Management Information Systems

GPA: 3.6, ACT: 32

Dean's List

Spring 2012, Fall 2012, Fall 2013, Spring 2014

### Relevant Coursework

Finance, Intermediate Financial Accounting, Intermediate Managerial Accounting, Fixed Income Securities, Portfolio Management, Corporate Finance, Financial Derivatives, Financial Options, Financial Modeling, Financial Statement Analysis

## EXPERIENCE

---

### Carlson Funds Enterprise, Fixed Income Credit Analyst

August 2014 - Current

Minneapolis, MN

- Followed Industrial and Capital Good sectors for investment grade rated credits to create buy, hold and sell recommendations based on analysis of current market sentiment and quantitative models of credits and their closest comparable companies.
- Maintained open dialogue with portfolio managers and other analysts about investment strategy and target sectors to position a \$40 million fund to best address the needs of the investors.
- Coordinated and worked with an investment team of four analysts to allocate credit assignments and create investment recommendations that were then presented to the portfolio managers and analysts.

### Columbia Management, Fixed Income Intern

June 2014 – August 2014

Minneapolis, MN

- Tracked macroeconomic conditions to generate predictions on interest rate movements and position fund in line with views.
- Utilized Bloomberg and Blackrock Analytics to monitor yield, duration and FX exposure versus the benchmark to determine where to increase or decrease risk.
- Conducted fundamental research on fixed income credits to evaluate different leverage and performance drivers.
- Collaborated with Threadneedle Investments in London to construct a global bond portfolio focusing on both sovereign bonds and exchange rate positions.

### ISM Capital, Investment Banking Intern

January 2014 – April 2014

London, UK

- Built detailed financial models to evaluate performance under various scenarios and the impacts of different capital structures.
- Participated in the all aspects of transaction execution, from initial presentation pitch through closing.
- Analyzed financial information to value companies utilizing methods including discounted cash flow and leveraged buyout.
- Designed presentation materials used in service pitches and client meetings.

### TCF Bank, Financial Analyst Intern

May 2013 - August 2013

Minneapolis, MN

- Forecasted 15 month loan volume and trends based on current and potential interest rate environment.
- Constructed financial models in Excel to address changing trends and product lines.
- Monitored daily volume and net gain from loan portfolio to create reports for senior managers.

## LEADERSHIP AND INVOLVEMENT

---

### Sapphire Consulting, Assistant Director, Senior Team Leader

August 2013 - Current

Minneapolis, MN

- Modified application process to create better balanced and personalized teams for each project.
- Determined the consulting needs and preferences of non-profit organizations in the Twin Cities area through a series of personalized meetings with the organizations' executives and board of directors.
- Worked closely with teams of 4-8 consultants to accomplish tasks and create presentation of developed strategic goals.

### Alpha Kappa Psi Professional Business Fraternity, Professional Committee Chair

September 2012 - Current

Minneapolis, MN

- Organized and ran fundraising events, case competitions, and mock interviews.
- Contacted companies for potential internships, presentations and site visits.

# Alec Haahr

1101 University Ave SE Apt. 408 • Minneapolis, MN, 55414 • 605-595-4282 • haahr003@umn.edu

## Education

---

University of Minnesota - Twin Cities	Minneapolis, MN
Curtis L. Carlson School of Management	May 2015
Bachelor of Science in Business: Finance and Accounting	GPA: 3.86
Dean's List	ACT: 33

## Work Experience

---

<b>Raymond James</b>	Memphis, TN
<i>Fixed Income Capital Markets Intern</i>	June 2013 - August 2013

- Researched short-term trends and provided administrative support for head corporate trader
- Created research reports for municipal and corporate research analysts using EMMA and Moody's data
- Synthesized an investment portfolio overview in Excel from multiple reports highlighting performance by security type and maturity, risk levels in portfolio, and depicting cash flow. New report generation required 90% less time
- Detailed risk levels in traders' portfolios in Bloomberg and made recommendations based on aging policies and duration hedging by maturity bucket
- Rotations in Sales, Trading, Public Finance, and Research

<b>MetaBank</b>	Sioux Falls, SD
<i>Financial Analyst Intern</i>	May 2012 - August 2012

- Updated financial models for prepaid card partners and reported changes in level of profitability and underlying causes
- Maintained a weekly file documenting overall deposit volume and deposit volume by partner- used VLOOKUP formulas, macros and pivot tables in process. Report used to generate deposit forecasts and determine future capital requirements
- Analyzed monthly divisional financial statements to investigate causes of substantial variances month-over-month relative to the budget to increase accuracy in forecasting

<b>University of Minnesota – Twin Cities</b>	Minneapolis, MN
<i>Teaching Assistant – FINA 3001: Introduction</i>	August 2013 – December 2013

## INVOLVEMENT

---

<b>Carlson School of Management Funds Enterprise</b>	November 2013 - Present
<i>Research Analyst - Admitted</i>	

- Manage a \$40 million dollar fund comprised of a fixed income and small cap growth fund
- Work with faculty, undergraduate and graduate students to develop pitches and monitor portfolio based on valuation models

<b>CFA Institute Research Challenge</b>	September 2013 - Present
---	--------------------------

- Perform comprehensive valuation analyses including discounted cash flow and comparable company analyses
- Utilize Bloomberg and FactSet to perform in-depth company and industry research and analysis necessary to craft an initiating coverage report
- Five member team presents report and recommendation with a PowerPoint presentation to a board of local industry professionals with the top team advancing to the regional level

<b>Volunteer Tax Assistance Program</b>	November 2012 - Present
<i>Certified Advanced: Site Coordinator – General Operations, Quality Reviewer</i>	

- Identify recurring errors and provide instruction for accurate preparation as dedicated technical expert
- Previously reviewed the work of four tax preparers on a regular basis to ensure accuracy and compliance as Quality Reviewer

<b>Delta Sigma Pi- Professional Business Fraternity</b>	September 2011 - Present
<i>VP of Scholarship and Awards, VP of Community Service, Pledge Class President, National Events Coordinator</i>	

- Organized Fraternity's first bone marrow drive, responsible for 40+ volunteers, registering 200 potential donors
- Promote academic excellence through a scholarship program featuring goal setting, periodic check-ins, and study tables

## PERSONAL

---

Experienced traveler, intramural volleyball champion, single digit handicap golfer, proficient in Spanish

# MITCHELL N. JACOBSON

4501 Sparrow Road, Minnetonka, MN 55345 • (952) 454-6441 • jaco1502@umn.edu

## EDUCATION

---

**University of Minnesota**, Curtis L. Carlson School of Management

Minneapolis, MN

**Bachelor of Science in Business**

May 2015

**Majors:** Finance and Accounting, **Minor:** Economics

**GPA:** 3.79, Dean's List

**ACT:** 31

**Relevant Coursework:** Financial Markets and Interest Rates, Corporate Finance I and II, Calculus I and II, Intermediate Accounting, Individual Income Tax, Managerial Accounting and Intermediate Macroeconomics

## EXPERIENCE

---

**Piper Jaffray & Co.**

Minneapolis, MN

*Equity Research Intern – 3D Printing and Networking Group*

November 2013 – Present

- Work directly with research analysts to support coverage of 15 different 3D printing and networking stocks
- Responsible for performing channel checks and company analyses to update financial models
- Perform due diligence on trends and consumer behavior in the technology industry

**Carlson School of Management Funds Enterprise**

Minneapolis, MN

*Research Analyst*

November 2013 – Present

- Manage a \$40 million portfolio comprised of a small cap growth fund and a fixed income fund
- Research and prepare analyses on potential investments and oversee trade execution

**Affiance Financial**

St. Louis Park, MN

*Financial Analyst Intern*

April 2013 – August 2013

- Initiated coverage of 18 different mutual funds across fixed income and equity sectors using Morningstar
- Authored analyst reports providing investment recommendation for each of the 18 funds covered
- Wrote macros to aggregate client investment data into portfolio summary report using Visual Basic
- Compared the performance of actively managed funds to indices over the last 50 years
- Prepared a presentation on the effects of rising interest rate environment on global economy
- Developed market outlook recommendations based on research of various economic indicators

**Rush Creek Golf Club**

Maple Grove, MN

*Customer Service Representative*

March 2011 – October 2012

- Managed driving range staff and supply levels to meet daily forecasted demand
- Administered course cleanup techniques to improve closing efficiency by 50%
- Organized 15 corporate tournaments each with 140 participants
- Coordinated wedding set-up for events by developing and executing ballroom set-up plans

## ACTIVITIES

---

**University of Minnesota Stock Trader's Club**

September 2011 – Present

- Managed a simulation portfolio that achieved an annualized return 5% higher than the S&P 500

**Delta Sigma Pi Professional Fraternity**

January 2013 – Present

- Provide business strategy recommendations for local startup as part of volunteer consulting group
- Organize athletic events for the fraternity including racquetball tournament and weekly running club

**Habitat for Humanity Club**

September 2012 – Present

- Volunteer at monthly house builds around the Twin Cities for families in need
- Participated in week-long house build in Mandeville, LA

**University of Minnesota Welcome Week Leader**

January 2012 – September 2012

- Volunteered over 100 hours and led a group of 25 freshmen through five days of orientation activities
- Facilitated small group discussions for freshmen to ease their transition into college

## INTERESTS

---

Racquetball, pond hockey, surfing and golf

# Jacobey P. Johnson

1000 University Ave. SE Apt. 417, Minneapolis, MN 55414 • (320) 226-5043 • joh09495@umn.edu

## EDUCATION

---

### University of Minnesota

*Curtis L. Carlson School of Management, Bachelor of Science in Business*

Major: Finance; Minors: Accounting & Entrepreneurial Management

GPA: 3.80; Dean's List: Fall 2011 - Spring 2013

Minneapolis, Minnesota

May 2015

Relevant Coursework: *Financial Modeling, Security Analysis Capstone, Financial Markets and Interest Rates, Principles of Corporate Finance, Portfolio Performance and Evaluation, Banking Institutions, Finance Fundamentals, Intermediate Accounting, Managerial Accounting, Intermediate Managerial Accounting, Financial Accounting, Principles of Microeconomics*

## EXPERIENCE

---

### Lazard Middle Market

*Summer Analyst*

Minneapolis, Minnesota

June 2014 - Present

- Staffed on projects and live deals within the industrial, technology and business service sectors
- Responsible for sourcing, creating and editing public information books, pre-pitch decks, pitch decks, IoI summaries, buyer profiles and management presentations
- Experience with public comparables and precedent transaction screens, valuation involving DCF and LBO methods and populating data rooms for potential buyer due diligence

### Greene Holcomb Fisher

*Investment Banking Intern*

Minneapolis, Minnesota

January 2014 - May 2014

- Conducted market and industry research providing pertinent data to devise CIMs and other deliverables
- Performed company valuation by way of inputting historical company financials and defining realistic financial drivers within discounted cash flow models to arrive at precise financial metrics
- Sourced precedent transaction comparables via Capital IQ software and determine relevancy for accurate financial evaluation

### Carlson School of Management Funds Enterprise

*Research Analyst & Associate Accountant*

Minneapolis, Minnesota

November 2013 - Present

- Collectively manage \$38 million portfolio comprised of a small cap growth fund and a fixed income fund
- Responsible for covering financial sector credits and educating colleagues on developments within the space
- Research and prepare analyses on potential investments while learning fund management techniques

### Land O'Lakes

*WinField Accounting Intern*

Shoreview, Minnesota

May 2013 - August 2013

- Managed five canola crop business lines, including preparing and booking entries to accrue for sales, returns, and various marketing programs; performed matching balance sheet reconciliations
- Prepared a credit rebill/return rate reserve summary monthly to ensure appropriate accrual and reserve amounts for all crop protection product lines totaling \$298M in annual sales
- Reconciled four years of invoices and wire transfers amongst AgroCentre and WinField Solutions to validate expenses
- Acquired and used financial statements from five joint ventures each month to roll-up \$5.7M worth of annual equity earnings onto WinField's books

## ACTIVITIES

---

### Delta Sigma Pi (Professional Business Fraternity)

*Brother*

Minneapolis, Minnesota

May 2012 - Present

- Actively engage in professional, social, and community service events
- Responsible for scheduling athletic events to promote brotherhood and fitness amongst 92 brothers

### Carlson Crew

*Crew Leader*

Minneapolis, Minnesota

May 2012 - May 2014

- Provided eight freshmen students with academic, professional, and personal guidance in order to ease their transition into collegiate life, making them aware of academic resources and opportunities available to them
- Created monthly social gatherings to build a sense of community within the Carlson School

## AWARDS & INTERESTS

---

- Student of the Year, *Finalist (awarded to 3 students of the sophomore class)*
- Carlson School of Management Undergraduate Case Competition, *2<sup>nd</sup> Place (in a field of 12)*
- Hobbies include playing pickup basketball and golf, watching documentaries and traveling

# ANDREW L. KIMBLE

803 Brenner Avenue

Saint Paul, Minnesota 55113

651-675-7277

alkimble@gmail.com

---

## Education

### University of Minnesota

Minneapolis, MN

Carlson School of Management

Bachelor of Science in Business

May 2015

Major: Finance

Minor: Accounting

**GPA: 3.56**

---

## Work Experience

### Carlson Funds Enterprise

Minneapolis, MN

*Equity Analyst, Growth Fund*

May 2014 – Present

- Analyze and manage investments of a \$20 million small-cap equity fund
- Conduct analyses of equities including DCF models, relative valuations, industry analysis, and competitive strategies within industries
- Create and prepare financial forecasts, performance evaluations, and ongoing research on current holdings using FactSet, Bloomberg, and Morningstar

### Royal Bank of Canada

Minneapolis, MN

*Financial Analyst Intern*

June 2014 – August 2014

- Produced monthly management reports used by executives to measure and direct business strategies
- Created profitability models used by business leaders to drive competitive strategy resulting in a potential of \$3 million in additional revenue
- Managed projects across multiple business lines to provide accurate forecasts to team managers
- Utilized VBA to create a new monthly report used by branches to improve AUM mix

*Corporate Planning and Analysis Intern*

June 2013 - August 2013

- Created financial models for several different teams in the organization
- Analyzed financial information to spot patterns and trends
- Communicated across many business units in order to gain and distribute information

### University of Minnesota Foundation Real Estate Advisors

Minneapolis, MN

*Financial Analyst Intern*

Sept 2013 – May 2014

- Analyzed and created cash flow models for \$10 million in properties around the Metropolitan area
- Assessed current and future positioning in real estate investments
- Clarified data, research, and financial information to other departments within the organization that had no financial background
- Created an interactive real estate investment research tool using VBA

---

## Volunteer Experience

### Eastside Thrive

St. Paul, MN

Tutor kids from kindergarten through high school

Fall 2012- Present

**University of St. Thomas, Tutor/Mentor Program**

St. Paul, MN

1<sup>st</sup> Grade tutor

September-December 2011

# Anthony Turgeon

10945 Maryland Ave N • Champlin, MN 55316 • 612-644-4536 • turg0063@umn.edu

---

## EDUCATION

---

### University of Minnesota

*Curtis L. Carlson School of Management*

Bachelor of Science in Business

Major: Finance

Minor: Accounting

GPA: 3.749

Minneapolis, MN

May 2015

### London School of Economics and Political Science

Summer Study Abroad Program

London, England

Summer 2013

Relevant Coursework: *Business Analysis & Valuation, Corporate Finance, The Global Economy (Macro), Intermediate Accounting, Macro & Micro Economics, Finance Fundamentals, Financial Markets & Interest Rates, Portfolio Mgmt. & Performance Evaluation, Options and Derivatives, Banking Institutions, Financial Modeling, Security Analysis*

## EXPERIENCE

---

### Marquette Capital Partners

*Private Equity Intern*

Minneapolis, MN

January 2014- Present

- Assist in the research, support, and analysis of current portfolio companies and new investment opportunities
- Conduct and analyze research on prospective investments then create investment memorandums for new deal discussions
- Assist in company valuation and return analysis through research of comparable transactions, analysis of financial statements, and use of discounted cash flow, multiple and leverage buyout models

### Carlson Funds Enterprise

*Research Analyst*

Minneapolis, MN

November 2013- Present

- Manage a \$40,000,000 investment fund with undergraduate and MBA students
- Is the third largest student-managed fund in the world, based on total assets
- 1 of 5 undergraduates admitted to the fixed income fund

### Mortgage Elite Inc.

*Loan Officer*

Plymouth, MN

May 2012- September 2013

- Originated residential mortgages by analyzing client's financial situations and finding them the best options
- Overcame problems related to the loan through coordination and communication with underwriters, lenders and clients before, during and after the origination process
- Assessed the potential risk of clients through evaluation of their financial statements and credit history then determined the likelihood of qualification

*Telemarketer*

August 2009- May 2012

- Spoke to homeowners about refinance options and passed interested clients onto loan officers
- Trained in new telemarketers on customer service skills and general industry knowledge

### Save My Home USA

*Loan Modification Specialist*

Blaine, MN

March 2009- August 2009

- Developed communication and sales skills through over the phone interactions with clients in regards to modifying their loan

## ACTIVITIES AND LICENCES

---

### University of Minnesota

*Research Assistant*

January 2014- April 2014

- Assisted the accounting department with data collection for a study on company press releases

### Carlson Investment and Finance Organization, Member

September 2011-Present

---



# Rycho H. Zhuo

2015 Riverside Ave. Apt 302 / Minneapolis MN 55414 / (612) 839-6544 / zhuox009@umn.edu

## EDUCATION

---

### University of Minnesota

Curtis L. Carlson School of Management

Bachelor of Science in Business

Majors: Finance, Public/Nonprofit Management. Minor: Entrepreneurial Management

Minneapolis, MN

Expected Grad Date: May 2015

Cumulative GPA: 3.78

## EXPERIENCE

---

### Carlson Funds Enterprise

- Growth Fund Analyst, Marketing Strategist -

Minneapolis, MN  
March 2014 – Present

- Analyze and monitor the fund's investments and present portfolio recommendations to the advisory board.
- Develop and execute marketing communication strategy to increase the public awareness of the enterprise.

### Agricultural Bank of China Ltd.

- Finance and Accounting Intern -

Foshan, China  
July 2013 – August 2013

- Trained in International Settlement, Foreign Exchange Trading, Corporate Banking and Lending departments.
- Prepared Audit Inquiry Confirmation Letter for client firms, and organized corporate bills and accounting info.
- Assisted legal departments with financial crime investigations and account inspections.

### Sinoway International Education Group Ltd.

- Regional Marketing Representative -

Minneapolis, MN  
October 2012 – May 2013

- Researched University and College academic policies on credit transfer, and produced a detailed instruction package to assist prospective students on admission and scholarship application processes.
- Served as a representative to reach out to relevant academic departments, offices, individuals and organizations within numerous Universities to establish connections and partnership.

### Foshan Hande Co., Ltd. (Medical Device Maintenance)

- Operation Assistant -

Minneapolis, MN / Foshan, China  
May 2011 – April 2013

- Advanced the communication system between the company and its corporate customers.
- Recognized cash flows and prepared financial journal entries, set up general rules for the company operations.
- Supervised overseas equipment purchases with suppliers in the U.S. and Europe.

### Friends Camp (Volunteer Teaching)

- Voluntary Operation Assistant -

Foshan, China  
April 2011 – August 2012

- Worked as a representative for regional trade fair in 2011 and 2012, served to outreach other organizations and established connections and partnerships, as well as fundraising.
- Recruited 50+ volunteers from local high schools and Universities for the each summer terms.
- Updated database using Microsoft Word/Excel and organized recruiting information and applications.

### AFS Intercultural Programs

- Program Consultant, Event Organizer -

Guangzhou, China  
June 2009 – July 2012

- Provided consulting services to domestic and international students participating in the program.
- Organized key events that served to enhance the participants experience in AFS, including some short trips.

- Exchange Student Ambassador -

Turin, Italy

- Studied in Turin, Italy for 10 months as one of 200 student ambassadors selected from a pool of 8,000 international applicants. Stayed with a local host family and attended local high school.
- Participated in various cross-cultural forums and events, including 2008 G8 University Summit in Turin.

## ACTIVITIES

---

International Buddy Program / Business Association of Multicultural Students (BAM) / Net Impact (Nonprofit) / Student Crossing Borders / Carlson GLOBE Program / Students Today Leaders Forever / Small World Coffee Hour

## SKILLS

---

Language Proficiency: Cantonese – Native / Chinese Mandarin – Native / Italian – Intermediate.

Bloomberg Terminal/FactSet/MorningStar/Microsoft Excel/Word/PowerPoint