# Beau B. Kramer

+1 925-216-7865 ▪ [KRAMERBEAU@GMAIL.COM](mailto:KRAMERBEAU@GMAIL.COM) ▪ [HTTPS://BEAUKRAMER.GITHUB.IO/](https://beaukramer.github.io/)

## EXPERIENCE

**UNIVERSITY OF CALIFORNIA, BERKELEY** — **BERKELEY, CA**

*Masters of Information and Data Science* **GPA:** 3.9/ 4.0 — EXPECTED GRADUATION MAY 2019

- **Relevant Coursework:** Python for Data Science, Research Design and Applications for Data and Analysis, Statistics for Data Science, Fundamentals of Data Engineering, Applied Machine Learning, Experiments and Causality**,** Statistical Methods for Discrete Response, Time Series, and Panel Data, Natural Language Processing with Deep Learning
- **Selected Projects:** Dynamic Clustering with Equity Fundamentals, Eigenfolios, Market Space Analogies with K-means, Automated Essay Grading with Deep Learning, Python Translation of "Quantitative Investment Portfolio Analytics In R"

**ICONIQ CAPITAL** — **SAN FRANCISCO, CA**

*Financial Analyst* — MARCH 2015 – MAY 2016

- Managed institutional sized portfolios incorporating allocation, concentration, and liquidity
- Constructed target allocation and planned transition for clients, including migrating multi-hundred million dollar bond portfolios
- Created custom pitch books for prospective clients communicating firm's value, analyzing current holdings, and presenting solutions
- Performed trades in the implementation of client portfolios as well as trades for pooled proprietary vehicles
- Performed quantitative and qualitative analysis of client portfolios to drive decision making
- Created ad-hoc analyses in response to client requests to guide their decision making processes
- Member of central reporting team responsible for updating data on private investment vehicles in Addepar database

**UBS FINANCIAL SERVICES, INC.** — **SAN JOSE, CA**

*Wealth Strategy Associate, Silicon Valley Investment Group* — JANUARY 2014 – MARCH 2015

- Responsible for management of private client portfolios underneath Sr. Wealth Strategy Associate
- Constructed and refined client asset allocations with Sr. Wealth Strategy Associate
- Performed trades in the implementation and rebalancing of client portfolios
- Performed due diligence of prospective investment vehicles and interviewed portfolio managers
- Constructed and reviewed 10b5-1 trading plans for Section 16 Officers of corporate clients
- Coordinated with Wealth Planning Analyst in delivery of financial plans to clients

**GOLDMAN SACHS GROUP, INC.** — **SALT LAKE CITY, UT**

*Business Analyst, Biotech Team* — JUNE 2013-OCTOBER 2013

- Fulfilled model-building and information-flow role for smid-cap biotech team
- Responsible for detailed note-taking on calls with ownership and subject-matter experts to provide color to Senior Analyst
- Responsible for disseminating new research items to sensitive client list in a timely manner

**UBS FINANCIAL SERVICES, INC.** — **SAN JOSE, CA**

*Intern, Silicon Valley Investment Group* — JULY 2012 – MARCH 2013

**ALCHEMY VENTURES, INC.** — **SAN MATEO, CA**

*Intern* — MARCH 2011 – AUGUST 2011

**WELLS FARGO & COMPANY** — **SAN FRANCISCO, CA**

*Intern, Wealth Brokerage Retirement and vSafe Group* — JULY 2010 – SEPTEMBER 2010

## LICENSES & CERTIFICATIONS

**CFA INSTITUTE**

- *Passed all 3 Levels of CFA Examinations*
- **Relevant Coursework:** Ethical and Professional Standards, Investment Tools, Quantitative Methods, Economics, Financial Reporting & Analysis, Corporate Finance, Portfolio Management, Asset Valuation (Equity, Fixed Income, Derivatives, Alternatives)

**FINRA** Series 7, Series 63, Series 65

*Certifications & Training:* Breaking Into Wall Street Financial Modeling Course

## EDUCATION

**SANTA CLARA UNIVERSITY** — **SANTA CLARA, CA**

*Bachelor of Science in Commerce with a Major in Finance* **GPA:** 3.9/ 4.0 — JUNE 2013

- **Relevant Coursework:** New Venture Finance, Entrepreneurial Finance, International Finance, Investments, Corporate Finance, Managerial & Financial Accounting, Aggregate Economic Theory, Statistics, Micro/Macro/International Economics, Leadership
- **Awards:** Leavey Business Scholar (Top 10% of all Leavey School of Business students), Dean's List (All Academic Quarters)

## SKILLS

**Programming:** Python, R, SQL, Matlab, Spark

**Software:** Git, Github, Microsoft Office, Docker