

BENNETT A. SCHULTZ

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EDUCATION

University of Illinois at Urbana-Champaign – Gies College of Business

Expected Graduation: May 2028

Bachelor of Science in Finance & Accountancy

GPA: 3.97/4.00

EXPERIENCE

Illinois Investment Management Academy – Champaign, IL

August 2025 – Present

Senior Analyst

- 1 of 27 students admitted to a highly selective multi-year program tailored to careers in investment management
- Built three-statement models and equity reports to support a \$1.6M equity portfolio using S&P CapIQ and Bloomberg Terminals
- Placed 2nd in a stock pitch competition with a full equity report, investor-grade slide deck, and three-statement model for FIX

Self-Directed & Funded Portfolio Manager – Plainfield, IL

January 2020 – Present

Portfolio Manager

- Grew a self-managed portfolio from \$12,000 to \$130,000 through 1,500+ trades in technology, consumer, and aerospace sectors
- Independently created stock-pitch slide decks in my free-time, emphasizing professional design and thorough investment theses
- Honed stress management, conviction, and disciplined decision making through volatile market conditions and rigorous analysis

Investment Portfolio Organization – Champaign, IL

February 2025 – May 2025

Analyst

- Placed 2 of 13 in a semester-long stock pitch competition covering industry analysis, valuation, and modeling for Hamilton Lane
- Gained experience in investment screening, company research, and fundamental analysis to identify high-quality stocks to pitch
- Attended weekly lectures on finance topics including investing principles, financial statements, risk management, and valuation

Prime Mergers & Acquisitions – Champaign, IL

September 2024 – December 2024

Sell-Side Analyst

- Engaged in a semester-long case competition acting as a mock sell-side analyst advising Traeger on a potential acquisition
- Constructed financial models containing relative and intrinsic valuations, identifying an implied enterprise value of \$712 - \$890m
- Gained in-depth exposure to investment banking through comprehensive instruction in valuation, deal structuring, and modeling

Goldman Sachs; Virtual Insight Series – New York City, NY (Remote)

May 2025 – June 2025

Participant

- Selected from a competitive pool to participate in a four-week Virtual Insight Series preparing undergraduates for future recruiting
- Engaged in live sessions and modules with Goldman Sachs professionals to attain industry insight and professional development
- Gained cross-divisional exposure while developing applicable technical and soft skills through live sessions and education modules

WORK EXPERIENCE

Clean Image Car Wash – Plainfield, IL

February 2024 – August 2024

Detailer/Dryer

- Delivered high-quality interior and exterior detailing services, ensuring customer satisfaction and vehicle cleanliness standards
- Managed fast-paced workflow by drying and detailing 30+ vehicles per shift with consistent attention to detail and time efficiency
- Communicated effectively with customers to address concerns and upsell premium wash packages and services to increase revenue

Independent Reseller – Plainfield, IL

December 2023 – August 2024

Manager

- Managed sourcing, listing, packaging, and shipping of 100+ clothing items, generating over \$1,000 in revenue, with \$700 in profit
- Oversaw end-to-end operations including inventory, product photography, and customer service to ensure operational efficiency
- Developed pricing strategies and optimized listing across Depop, eBay, and in-person sales to drive outreach and profitability

INVOLVMENT

Beta Alpha Psi Professional Business Fraternity – Champaign, IL

February 2025 – Present

Sports & Wellness Chair

- Selected as one of 36 members from a pool of 250+ students through a competitive professional interview process and social events
- Coordinated 80+ members in a competitive athletic event: maintaining group attention, tracking scores, and managing disputes
- Organized and led sporting activities / wellness initiatives to promote active member engagement and overall wellbeing

Finance Academy – Champaign, IL

January 2025 – May 2025

Member

- Selected for a one-semester technical finance program providing exposure to financial software, modeling, and statement analysis
- Developed skills in valuation and financial analysis through comprehensive technical modules taught by industry professionals
- Engaged with faculty and peers in an environment designed to prepare students for placement into academics and finance roles

HONORS, ACTIVITIES & INTERESTS

Honors: Gies College of Business Dean's List, AP Scholar with Distinction, Illinois State Scholar

Activities / Certifications: Golder Freshman Academy, Bloomberg Market Concepts Certification, Powerlifting, Cunningham Case Comp

Interests: Dirt Biking | Investing | White Sox | Ferrari | Aston Martin | Chess | Weightlifting | Christopher Nolan | Poker | Ralph Lauren