

Brenner Swenson

Personal Info

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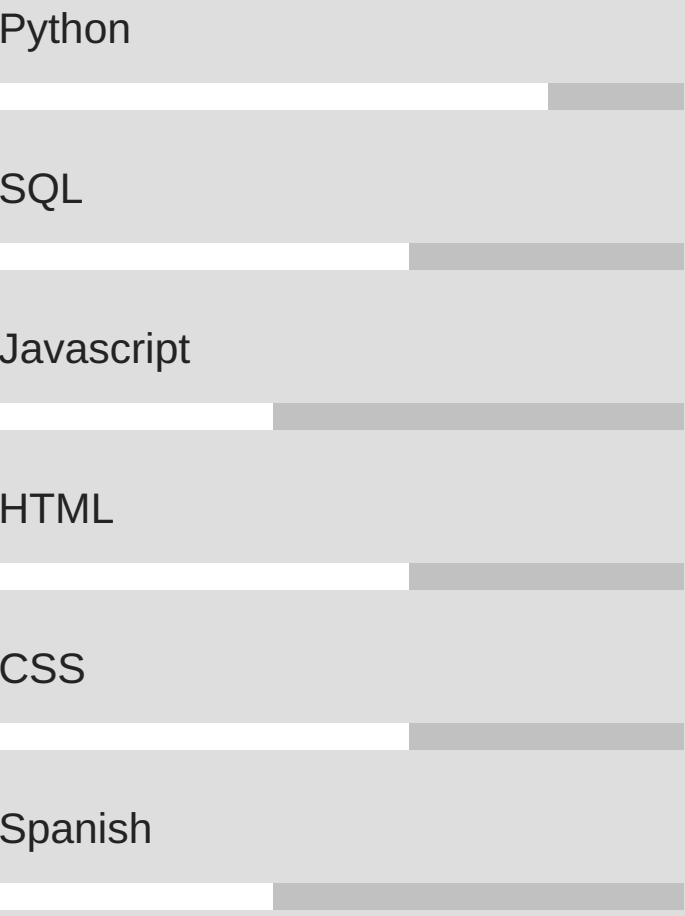
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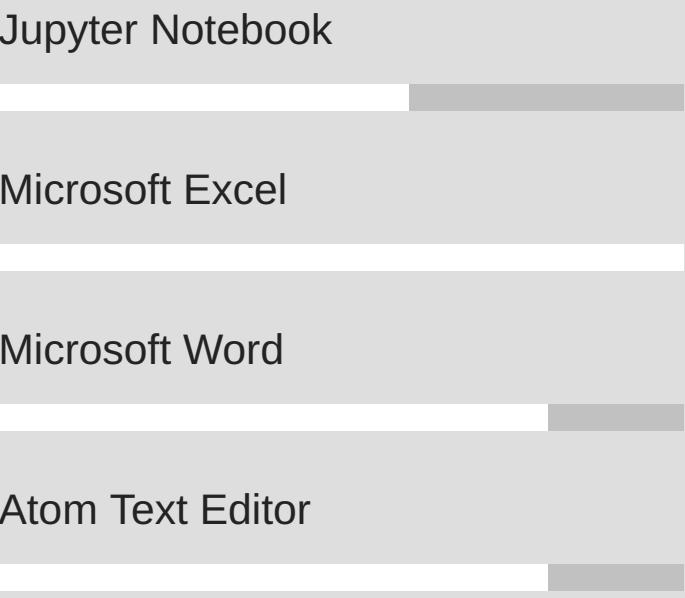
WWW
brennerswenson.com

LinkedIn
linkedin.com/in/brenner-swenson/

Languages



Software



Skills

Investment reporting, accounting

Data analytics

Web development

Equity research, valuation

Experience

Nov 2016 - Jun 2018	Analyst <i>Strata Fund Solutions LLC - Salt Lake City, Utah</i> <ul style="list-style-type: none">Collaborated directly with clients, hedge and private equity fund controllers, tailoring financial reporting packages and processes to fit their distinct needsDeveloped an interactive Python script to password-protect bulk amounts of .pdfs in seconds, saving teams hours of manual workTransitioned a global micro-lending fund’s financial reporting process away from Excel manual input to an efficient query-based process using Microsoft’s OLE DB API and third party alternative investment accounting softwarePrepared monthly financial statement packages for a \$120m hedge fund of funds, with underlying portfolio strategies in global equity, absolute return, hedged equity, and fixed incomeSolely produced monthly/quarterly performance reporting for a University’s Endowment Pool with over \$1bn AUMCreated and compiled audited financial statements, supplementing schedules, and footnotes for two large hedge and private equity funds. Cooperated with auditors daily, responding to and concisely resolving their inquiriesPrepared quarterly financial statement packages and investor reporting for six private equity funds with aggregate capital commitments in excess of \$200mAided new analysts during their first months, reviewed their work and assisted them with the industry’s learning curve
Dec 2014 - Nov 2016	Lead Teller <i>Wells Fargo Bank, N.A. - Salt Lake City, Utah</i> <ul style="list-style-type: none">Managed and coached a team of tellers whose loss figures remained the lowest in Salt Lake West District, while providing excellent client service in a fast-paced and deadline-driven environmentTransitioned between Spanish and English while processing transactions and resolving clients' needsMaintained optimal store cash levels and minimized losses by assisting other tellers with evaluation of high-risk transactions

Education

Aug 2013 - Aug 2017	University of Utah, Finance Major, Music Minor, Bachelor of Science <ul style="list-style-type: none">3.86 GPA, Cum LaudeDean’s List, all semestersRecipient of Ellen Neilson Barnes and Ted & Florence Jacobsen scholarships
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Additional Activities

Sep 2016 - Aug 2017	Finance Club, University of Utah <ul style="list-style-type: none">Learned about the world of finance through guest speakers and technical interactive workshops on a weekly basis
Aug 2013 - Jun 2016	Chamber Choir, University of Utah <ul style="list-style-type: none">Performed with world-renowned symphonic orchestras and toured multiple times throughout France and Spain

Interests

Financial analysis; writing interactive scripts in Python to draw conclusions and optimize investment performance

Web development; created own website using Django web framework

Collecting antique U.S. currency, including several notes dated before 1930