

# CALEB GATTIS

calebg98icloud.com

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Raleigh, NC 27607

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## EDUCATION

### **New Mexico State University**

*BBA: Finance*

**Las Cruces, NM**

*Class of 2020*

- Cumulative GPA: **3.8/4.0**; Major GPA: **4.0/4.0**
- Deans List, Crimson Scholar, high honors graduate (top 1.5%)

## WORK EXPERIENCE

### **Credit Suisse**

*Financial Analyst – Product Control*

**Raleigh, NC**

*Fall 2020 - Present*

- Working within the Structured Products - Derivatives group, I perform daily reconciliation and reporting for the Americas Derivatives business with daily P&L exceeding +/- \$10MM
- Completed accelerated Month End/Quarter End close processes under tight deadlines which involved reconciling MTD and YTD P&L and creating PeopleSoft Journal entries to adjust the ledger
- Collaborated across various business lines and frequently took ownership of ad-hoc projects and analysis with minimal supervision or guidance
- Communicated effectively to stakeholders throughout the firm (e.g., Front Office, Trade Management, Valuation Control) to solve problems and drive innovation to improve our processes

### **Edward Jones Investments**

*Financial Advisor Intern*

**Las Cruces, NM**

*Summer 2019*

- Worked one-on-one with my host Financial Advisor to develop an understanding of the industry and business practices
- Conducted door-to-door survey of 75+ residents to gain knowledge of the consumer sentiment & demographics in our market
- Planned, organized, and conducted a seminar which involved bringing in a product partner and marketing the event to our target audience
- Participated in weekly WebEx conference calls with other interns and Financial Advisors where we would discuss the prior week's case study or learning modules
- Completed a business plan over the course of the internship detailing the skills and resources I would leverage to be successful as a Financial Advisor

## LEADERSHIP & ACTIVITIES

### **CFA Institute Research Challenge (Passed CFA Level I)**

*Competitor*

**Phoenix, AZ**

*Fall 2019-Spring 2020*

- Gained real world experience in a global competition by utilizing skills in research, fundamental analysis, valuation, report writing, teamwork, and presentation
- Visited the headquarters of our subject company, Carvana (\$CVNA) where we spoke with executives in various roles and had the opportunity to ask questions that supplemented our research
- Prepared a comprehensive sell-side initiating coverage report detailing our findings and presented our findings to a panel of industry experts where we had the opportunity to defend our recommendation

### **Goldman Sachs Beyond the Classroom**

*Attendee*

**Salt Lake City, UT**

*March 2019*

- Gained valuable insight into the opportunities available within the Finance division
- Expanded my knowledge and experience of best practices regarding networking, recruitment, and working through adversity
- Reviewed results of Hermann Brain Dominance Instrument to learn how I prefer to think, learn, communicate, and make decisions as well as strategies for successful collaboration and communication

### **Lambda Chi Alpha Fraternity**

*Treasurer*

**New Mexico State University**

*January 2018-January 2019*

- Prepared & managed a \$40,000+ budget
- Facilitated all invoicing, accounts receivables and payables for the chapter as well as receipt of any cash payments
- Served as a voting member on the executive committee which mitigates chapter conflicts as well as management of risk and collection of any delinquent accounts

## ADDITIONAL INFORMATION

**Skills:** Time management, analysis of quantitative and qualitative data, ability to plan, organize, and prioritize work, problem solving, ability to communicate and work well within a team

**Computer:** Bloomberg Terminal, Python, Proficient in Excel, PowerPoint, Word

**Interests:** Learning new things, Capital Markets, Technology, Golf, and Snowboarding