

Jacob B. James

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EDUCATION

University of Illinois at Chicago | Bachelor of Science in Finance

Expected May 2025

- Cumulative GPA: 3.96/4.0; Major GPA: 4.0/4.0
- Minor in Human Resources Management.
- Dean's list in all semesters of attendance.
- Degree concentration in investment management, specializing in investment research and research-based decision-making.
- Member of the Finance and Investment Group, Quantitative Trading Club, and the Portfolio Management Team.

Relevant Coursework:

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| • Alternative Investments: Private Equity, Venture Capital, and Hedge Funds | • Investments (securities market overview) |
| • Advanced Investment Management | • Managerial Finance |
| • Applied Equity Investment Management | • Intro to Management Information Systems |
| • Cases in Corporate Finance | • Operations Management |
| • Personal Financial Planning | • Intro to Financial Accounting |
| | • Intro to Managerial Accounting |

SKILLS

- Proficient in utilizing Microsoft 365 applications (Microsoft Excel, PowerPoint, Word, Outlook, etc), the Bloomberg Terminal, S&P Capital IQ, government databases/datasets, and various Google applications.
- Skilled in equity research, fixed income research, industry analysis, utilizing valuation metrics, financial modeling, three-statement modeling, financial statement analysis, DCF analysis, and relative value analysis.
- Bilingual in Indian dialect named Malayalam.

EXPERIENCES

Incoming Teaching Assistant

Aug 2024 – May 2025

Department of Finance at the University of Illinois at Chicago | Chicago, Illinois

- Selected to become an undergraduate teaching assistant for FIN 456: Advanced Investment Management for the 2024-2025 academic year.

Research Analyst Intern

Jun 2024 – Aug 2024

Aegon Asset Management | Chicago, Illinois

- Worked as a research analyst intern primarily focusing on energy sector related fixed income assets for a firm with over 337 billion USD in assets under management.
- Provided analysis and evaluated numerous companies and their respective debt instruments within the energy sector, and presented my findings regarding their credit risk, business strategy, competitive position, industry risks, and overall financial health.
- Created and analyzed acquisition models, three statement models, debt schedules, capital structure tables, competition sheets, production projections, revenue forecasts, and expense forecasts.
- Participated in extensive research into oil and gas exploration and production, refining and marketing, midstream, oil and gas integrated, and oil field services companies through industry related primers, videos, research articles, and commodity conferences.
- Collaborated with numerous analysts and portfolio managers within the firm to understand their roles and duties in managing and analyzing a wide array of asset classes.
- Completed an AAM provided research analyst credit training program, a J.P. Morgan Chase North American credit bootcamp, and a CreditSights "New to Credit" summer learning program.

Equity Research Analyst

Jan 2024 – May 2024

Michael B. Mikhail Investment Fund | Chicago, Illinois

- Worked in a select team that is responsible for managing an endowment fund provided by the University of Illinois at Chicago's business school, while I specifically focused on energy and utility related US equities.

- Utilized the Bloomberg Terminal and various other investment research tools such as Charles Schwab Equity Ratings to create investment decisions and provide updates on the fund's current holdings and possible holdings.
- Proven proficiency in using various aspects of technical analysis, fundamental analysis, quantitative analysis, portfolio risk management, and qualitative research to create, deploy, and defend investment strategies.
- Assisted in providing weekly sector updates on the energy and utilities sector to various other sector teams. These updates usually entail discussing company earnings reports, sector news, current holdings news, investment research, and investment recommendations.

Ambassador of Business

Jan 2024 - Present

The University of Illinois at Chicago College of Business Administration | Chicago, Illinois

- Tasked with helping set up and monitor events and activities for the university's business school and the various organizations associated with the school of business.
- Required to always act as a representative of the school of business in a professional manner, and to provide a student perspective on attending the school of business and the university to all guests, new or potential students, and faculty.

Independent Contractor

Jan 2021 - Present

Uber, UberEats, and DoorDash | Chicago, Illinois

- Currently work part-time as an independent contractor for the Uber, UberEats, and DoorDash platforms.
- Maintained a 4.97 customer rating for over 2,600 combined deliveries and rides performed through the platforms.
- Prioritized customer satisfaction, cleanliness, courtesy, and utmost urgency when delivering or providing rides.
- Communicated with passengers of varying demographics for long periods of time while keeping a professional presence.

VOLUNTEER EXPERIENCES

Youth Coordinator of the Village of Niles

Oct 2023 – Present

St. Mary's Catholic Church | Morton Grove, Illinois

- I work with the priests at the church to coordinate young parish members in the Village of Niles to attend mass, church activities, and participate in community aid missions.
- I participate in monthly meetings with various other members of the parish in which activities hosted by the church are brainstormed and organized.

Religious Education Teacher

Aug 2020 – Jun 2021

St. Mary's Catholic Church | Morton Grove, Illinois

- Taught a 30-person 6th grade religious education class on Zoom during the COVID-19 pandemic.
- Evaluated the performance of the students throughout the course and provided relevant feedback.
- Create meaningful insights for the students about Catholicism and helped them meet numerous learning objectives.