

Carter Chen

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EDUCATION

The University of Chicago, Chicago, IL

Bachelor of Arts in Economics, June 2016. GPA 3.5/4.0

Honors Included: Dean's List 2012-2013, 2013-2014

Academe of the Oaks High School, Decatur, GA

Diploma, May 2012

Honors Included: All-State Orchestra (cello, 3 years), National Merit Commended Student

ACT Score: 34

EXPERIENCE

Unit 2 Fitness, Atlanta, GA

Sales Representative, December 2019 — Present

- Reach out and communicate with all prospective new gym members
- Set appointments and reminders for prospective new gym members
- Point-of-sale new member acquisitions
- Sold ~\$20k worth of memberships in first month and a half as sales representative

Dodge & Cox, San Francisco, CA

Research Associate, September 2016 — September 2018

- Provided input as part of a two-person team on capital allocation decisions for multi-billion dollar portfolio of public equity holdings in the financials sector, with a focus on large-cap US banks and credit providers
- Built and maintained bespoke financial models using Microsoft Excel for existing and prospective public equity investments
- Performed news-driven, ad-hoc fundamental investment research on portfolio holdings, including both financial and qualitative analysis, namely downside/threat estimation and modeling, market sizing, macroeconomic trend monitoring, and general corporate financial analysis
- Created and maintained Microsoft PowerPoint slide decks used during investment decision/capital allocation meetings
- Routinely met with c-suite officers of portfolio companies and participated in investment-maintenance dialogue
- Researched and wrote Environmental, Social, and Governance (ESG) due diligence assessments for portfolio companies

Morningstar, Inc., Chicago, IL

Institutional Equity Sales Intern, April 2014 — April 2015

- Formatted and distributed industry reports through services such as QuickBase, Morningstar Direct, and BD Vision
- Designed macro-based excel model to format bank analysts' FCFE output, which became the company standard for financials sector research reports

LEADERSHIP EXPERIENCE

The Blue Chips, Investing Club at The University of Chicago, Chicago, IL

Sector Leader, April 2015 — March 2016

- Lead 12-person team in sourcing, analyzing, and pitching a financials company every quarter to 100-person club
- Designed and presented lectures on financial accounting, competitive analysis, valuation, model building, and idea sourcing to new club members