

# Wallace (Wally) M. Estenson

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## EDUCATION

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### University of Wisconsin – Madison

*Degree: Bachelor of Business Administration*

Majors: Finance, Investment, & Banking; Economics

Minors: Computer Science; Environmental Studies

**GPA: 3.8 / 4.0**

Highlighted Coursework/Skills: Healthcare Economics, Programming (Java) I, II, III; Algorithms; Financial Accounting I, II; Python

Honors: Chou Kou-ping Scholarship Recipient, BBA Direct Admit, Dean's List, National Investment Banking Competition Finalist

**Madison, WI**

*September 2016 - May 2020*

### Hong Kong University of Science and Technology

*Study Abroad Program*

**Clear Water Bay, Hong Kong**

*January 2019 – May 2019*

## EXPERIENCE

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### William Blair & Company

*Investment Banking Summer Analyst – Technology Group*

**Chicago, IL**

*May 2019 – August 2019*

- Operated within high intensity deal teams for sell-side M&A transactions in the cybersecurity and collaboration technology industries; effectively managed workflows across offices and departments in an extremely fast paced and highly iterative process
- Facilitated and conducted sell-side processes including buyer outreach, financial analyses, and due diligence with exceptional organizational and communication skills supporting the needs of clients, prospective buyers, and other stakeholders
- Empathized with potential clients to create a presentation backed by analysis of internal and industrywide transaction data that was used by senior management at multiple private equity conferences with the goal of driving future business to the firm

### Affiance Financial

*Investment Research Analyst Intern*

**Minneapolis, MN**

*May 2018 – August 2018*

- Conducted in-depth quantitative and qualitative analysis on mutual fund investments with extensive use of Morningstar Direct
- Coded programs with VBA that took thousands of rows of unique customer portfolio data and created easy to understand reports, saving team 40+ hours a month. These included asset allocation drift reports for use by the financial advisors and a program that displays portfolio impacts of proposed trades, now used in client meetings and for internal trade analysis
- Developed excel models for investment research and analysis along with an in-depth model for Morningstar Rating predictions

### Aspire Beverage Company

*Manager and Marketing Consultant*

**Minneapolis, MN and Madison, WI**

*December 2014 – May 2017*

- Strategized marketing plan with senior management throughout full business life cycle, from startup to closure of operations
- Generated over \$1,000 in direct customer sales and over \$10,000 in indirect sales resulting from initiating retailer product orders
- Managed over 10 employees and coordinated with University officials while remotely communicating with senior management
- Led marketing teams in Madison and Minnesota at high-potential sporting events ranging from 50 – 3,000 attendees

## INVOLVEMENT

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### Wisconsin Investment Banking Club

*Former Vice President*

**Madison, WI**

*February 2017 – Present*

- Construct and implement high priority growth strategies including redesigning educational and interview preparation series
- Develop an understanding of valuation concepts and financial modeling techniques along with weekly current event discussions
- Designed club website (wiscibc.com) and implemented Google Analytics bringing ease of use for recruiters and elevating the club brand on and off-campus. Updated site gained attention of administration and became a model for other clubs on campus
- Coordinated annual trips to New York, Chicago, and San Francisco facilitated through alumni connections at over 20 of the nation's top financial institutions; led and managed over 30 club members during these excursions

### Hoofers Outdoor Club

*Ski & Snowboard Club: Elected Board Member*

**Madison, WI**

*September 2019 – Present*

- Elected to manage and maintain external relationships with local resorts, trusted by members of the largest club on campus

*Mountaineering Club: Trip Leader and Member*

*September 2017 – May 2018*

- Fostered a safe, educational, and fun environment for five to twenty club members while on climbing trips in the Midwest
- Planned trips with club leaders and coordinated with the University to acquire gear, transportation, and ensure successful trips

### Badger Blockchain Club

*Member*

**Madison, WI**

*January 2018 – December 2018*

- Developed an understanding of blockchain technologies and crypto-assets through group-based discussion and research
- Analyzed blockchain use-cases and assessed current market conditions through White Paper and value analysis

### Other Involvement

Founder of the Wisconsin Behavioral Economics and Finance Club (Jan. 2017 – Oct. 2017), UW Information Technology Student Consultant (Sept. 2016 – May 2017), Volunteer and Intern at Habitat for Humanity (Feb. 2015 – May 2016)

## INTERESTS

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Healthtech, Elon Musk, Podcasts, Preventive Healthcare, Organizing, Hiking, Biking, Skiing, Environmental Sustainability