

# Maria T. Bevilacqua

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www.linkedin.com/in/maria-bevilacqua

## EDUCATION

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**Xavier University**, Williams College of Business – Cincinnati, Ohio Expected May 2027  
Bachelor of Science in Business Administration (BSBA), **Accounting major** Dean's List: 08/2023 – 12/2024  
• Minor(s): Finance, Spanish GPA: 3.97  
• Smith Scholar Honors Cohort: Political Economy minor, academic scholarship

## ACCOUNTING RELATED EXPERIENCE

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**North American Properties** – Cincinnati, Ohio May 2024-Present  
*Internship*

- Utilizing Sage Intacct to perform journal entries and over 100 bank reconciliations each month.
- Responsible for bookkeeping of three of our companies' departments overseeing hundreds of owned entities.
- Actively expanding responsibilities within my team to learn tasks associated with investments and tax adjustments.
- Gaining valuable hard and soft skills and a greater understanding of the professional workplace.
- Proficient in MS-Windows and Adobe Acrobat.

**Stephanie L. Helfrich, CPA** – Mason, Ohio June 2023  
*Job Shadow*

- Utilized QuickBooks for tax, bookkeeping, and payroll.

## CAMPUS INVOLVEMENT

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**Accounting Society**, *Secretary* December 2023-Present  
• Responsible for submitting attendance after meetings/events and a year-end detailed report to summarize the club's activities throughout the semester.  
• Contributed to the planning of 5+ events for the club.

**Women in Business**, *Member* August 2023-Present  
**Competitive Club Volleyball**, *Player* August 2023-Present

## OTHER WORK EXPERIENCE

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**Dunkin'**, *Customer Service Representative* – Fairfield, Ohio June-September 2022  
• Strengthened effective communication through interactions with customers and coworkers while operating expeditiously; developed professional and leadership skills by training 5 new crew members.

**Skyline Chili**, *Server* – Fairfield, Ohio June-September 2021  
• Established customer service abilities and interpersonal skills with coworkers by supporting cooperation focused on the goal of customer satisfaction.

## RELEVANT SKILLS AND INTERESTS

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**Spanish Cultural Exchange and Immersion** – Zaragoza, Spain March-April 2022  
• Communicate in and translate Spanish; intermediate speaking, reading, and writing skills.

# Greta Boettcher

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## EDUCATION

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### University of Cincinnati, Carl H. Lindner College of Business

Cincinnati, Ohio

*Bachelor of Business Administration, Major: Accounting, Minor: Film and Media Studies*

Expected: May 2027

- Lindner Business Honors
- University Honors Program
- Cincinnati Century Scholar
- Emil E. Fleck, Jr. Scholarship
- George Terry Scholarship

### Saint Ursula Academy

Cincinnati, Ohio

- Admitted with Distinction
- First Honors Student
- National Honor Society

May 2023

## WORK EXPERIENCE

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### Tax Intern

May 2024 – August 2024

*Phillips Edison and Company*

Cincinnati, Ohio

- Prepare documentation for property tax appeals, federal tax returns, and personal property tax returns daily
- Prepare monthly sales tax reporting by implementing internal processes that ensure sound internal controls
- Complete state tax estimates, extensions, and returns with 100% accuracy
- Research property tax reporting requirements and areas of improvement for tax processes for the benefit of the company and its employees

### Shift Manager

July 2020 – August 2024

*Putz's Creamy Whip*

Cincinnati, Ohio

- Take a variety of orders and process the money of 300+ customers per shift in a welcoming and professional manner
- Prepare customizable orders with 100% accuracy, producing 200+ items per hour for upwards of 5 hours per shift
- Wipe down and sanitize all important surfaces to keep the workplace clean and healthy
- Manage coworkers on a daily basis and balance the cash drawer at the end of every shift, dealing with \$2,000+ with 100% accuracy

## LEADERSHIP AND COMMUNITY ENGAGEMENT

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### Brother

February 2024 – Present

*Delta Sigma Pi*

Cincinnati, Ohio

- Engage in brotherhood activities that involve community building, volunteering, and self-improvement
- Participate in diversity presentations that promote inclusivity and respect within the fraternity
- Attend professional events regularly that help improve professional and leadership skills within the business industry
- Donate to charity in multiple ways to support the local community and those in need

### Leader

August 2022 – May 2023

*Student Outreach Services (SOS)*

Cincinnati, Ohio

- Kept track of member attendance and participation in important meetings and service dates
- Addressed and solved issues in attendance and scheduling quickly and with 100% accuracy
- Tutored and supported 20+ young girls twice a month by teaching them life lessons and always treating them with kindness and respect
- Individually led 10+ organizational meetings, guided the group through learning activities, and kept them updated on upcoming events and service dates

## SKILLS

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- Spanish: intermediate fluency in reading, writing, and speaking

# Zander Cummins

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## EDUCATION

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### Bachelors of Science in Accounting

May, 2027

Mount Saint Joseph University

Cincinnati, Ohio

GPA: 3.5

Relevant Coursework: Taxation I & II, Intermediate Accounting I & II, Cost Accounting, Financial Accounting, Auditing, Business Law I.

## WORK EXPERIENCE

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### Delivery Driver

August 2024 – Present

Dominos

Crescent Springs, Kentucky

- Negotiated with customers to order more products, causing an increase in sales.
- Established strong customer service skills by dissolving conflict with dissatisfied customers, resulting in primary customer service role when no manager present.
- Interpreted maps, signs, and directions to perform and deliver products to individuals in a timely manner, improving satisfaction rates for individuals.

### Store Associate

May 2023 – Present

Walmart

Eastgate, Ohio

- Effectively contributed to department's goals, allowing daily store operations to work efficiently and at a steady pace
- Coordinated with other departments to prepare for seasonal changes throughout the store allowing annual store changes to take place smoothly.
- Encouraged customers to purchase alternative solutions instead of losing sales to other competitors, leading to an increase in sales.

### Crew trainer

May 2021 – May 2023

McDonalds

Bethel, Ohio

- Coached over 12 individuals to assist in preparing for shift duties and increase performance amongst.
- Oversaw individuals when managers were not present, running shifts and allowing operations to continue smoothly.
- Resolved disputes between coworkers and customers, improving customer service approval rating for the store, increasing customer referral and sales.

## ACTIVITIES

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- **Member, Alpha Lambda Delta Honor Society, August 2024 – Present**
- **Member, First To Go and Graduate, August 2023 – Present**
- **Student Advisor, Felicity Franklin FFA June 2022 – June 2023**

## VOLUNTEER WORK

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Felicity Franklin FFA

August 2019 - June 2024

Cardinals Community Care

August 2019 – July 2024

# Sienna M. Dombroski

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## EDUCATION

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### University of Cincinnati, Carl H. Lindner College of Business

Cincinnati, Ohio

*Bachelor of Business Administration, Major: Finance*

Expected: 05/27

- *Minor: Business Analytics*
- GPA: 4.0

### Study Abroad

02/23

*Costa Rica*

- Studied Spanish with native professors for 4 hours a day to learn the language and interact with locals
- Visited sites such as Alajuela Coffee Plantation, Iglesia Nuestra Señora de Las Mercedes, Arenal Volcano National Park
- Learned about the culture of the country through cooking classes, farm visits and communicating with locals

## ACADEMIC PROJECTS

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### SWOT Analysis

09/23-11/23

*Essentials of Business*

- Collaborated with Ernst and Young's Cincinnati location to gather advice to give back and strengthen their business
- Presented a 12-minute presentation to Ernst and Young employees providing findings from research with 13 students
- Crafted a 20-page group analysis paper to give to Ernst and Young employees with in-depth feedback

## WORK EXPERIENCE

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### NIL Brand Ambassador

01/24-Present

*Liquid I.V.*

- Generate 3+ social media posts per month for to promote the values of brand and increase interactions on the site
- Encourage a healthy and active lifestyle to viewers by showcasing how I use Liquid I.V. to get the most out of my day
- Share product with friends and family through use of discount code ensuring 20% off order

### Lifeguard, Part-Time

09/21 – Present

*Midvale Country Club, Eastridge High School*

Rochester, NY

- Monitor 30+ families in and around pool area by effectively communicating safety precautions
- Ensure pool water is safe and clean for families to swim in by testing with chemicals at least 3 times daily
- Clean pool deck, bathrooms, and pool regularly to reduce members from having accidents

### Choreographer, Part-Time

09/21 – Present

*Spins Dance Studio*

Rochester, NY

- Create choreography for groups up to 10 that are performed at competitions, recitals, and at the end of classes
- Train students to advance technique in ballet, contemporary and jazz by teaching and critiquing effectively
- Cover classes for full-time teachers when they cannot make class to advance my experiences as a choreographer

## INVOLVEMENT

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### Student Athlete

07/23 – Present

*University of Cincinnati Dance Team*

Cincinnati, OH

- Perform at 2+ major events every week including football, basketball, and volleyball games, orientations, etc.
- Practice collegiate level routines in HipHop, Pom and Gameday 3-4 nights per week adding up to 15+ hours
- Appear at community events to talk with locals about the programs history and spread goodwill

## AWARDS/HONORS

- High School Salutatorian 06/23
- National Honors Society (Treasurer) 09/22-06/23

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## SKILLS

- CPR Certified
- Social Media Content Creation
- Brand Awareness

# Avery Kraus

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www.linkedin.com/in/averykraus

## CAREER OBJECTIVE

Detail-oriented college student with a strong work ethic pursuing an internship in a wealth management firm to gain experience in portfolio management and financial advising. Began my business degree during my junior and senior year of high school.

## EDUCATION

**Mount St. Joseph University** 2024 – 2027

- GPA – 4.00
- Honors student in Junior level classes
- Bachelor of Science in Financial Economics Graduating 2026
- Master of Business Administration Graduating 2027

**University of Cincinnati** 2022 – 2024

- GPA – 3.89
- Earned Dean’s List in all four semesters and completed 61 credit hours
- Full time college student in my Junior and Senior years of High School through the College Credit Plus program
- Sample of courses: Personal Finance, Microeconomics, Macroeconomics, Financial Accounting, Managerial Accounting, Marketing, Business Communications, Calculus 1 and 2

**Wyoming High School** 2020 – 2024

- Weighted GPA – 5.27, Unweighted GPA – 3.87
- Graduated with a State of Ohio Honors diploma

## WORK EXPERIENCE

**Queen City Racquet Club and Fitness Center**, Tennis Instructor 2024 – Present

- Teaching high school and youth tennis classes

**Blue Ash Recreation Center**, Summer Tennis Program Manager 2024

- Managed 9 employees including creation and distribution of weekly schedule
- Resolved day-to-day issues involving recreation center members and staff
- Taught and assisted tennis and pickleball classes for kids and adults
- Prepared facility before classes and matches.

**Tennis Point**, Distribution Specialist 2021 – 2023

- Fulfilled average of 80-100 online orders with 2-3 items per order with 95% accuracy

## EXTRACURRICULAR ACTIVITIES

Mount St. Joseph University Student Investment Club, Founding Member 2024 – Present

Mount St. Joseph University Student Fellowship of Christian Athletes 2024 – Present

Queen City Racquet Club 2018 – Present

Wyoming High School Tennis 2020 – 2024

Young Life 2020 – 2024

# JOE LAIR

(937) 956-1868 | Lairj1@xavier.edu | Dayton, Ohio

## EDUCATION

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XAVIER UNIVERSITY – SMITH SCHOLARS **BUSINESS HONORS PROGRAM**

Cincinnati, OH

**Bachelor of Science in Business Administration**

May 2026

Major in **Finance**; Minor in Political Economy, Economics, Accounting

GPA: 3.99

## EXPERIENCE

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BAHL & GAYNOR INVESTMENT COUNCIL

Cincinnati, Ohio

**Wealth Management Intern**

May 2024 – Present

- Supported Portfolio Managers and Analysts
- Run reports on client accounts, analyze positions and tax implications, aid in preparation for client meetings, and help organize a software change
- Gain experience in wealth management and equity investing industries, learn about specific investment strategies

CENTERVILLE OPEN PICKLEBALL

Dayton, Ohio

**Founder/ Organizer**

May 2023 – May 2024

- Hosted pickleball tournaments in support of the American Cancer Society and Miami Valley Hospital
- Created organization, managed software, created branding & marketing materials (logos, flyers, graphics), managed finances, marketed to clients, organized insurance, and corresponded with sponsors and vendors
- Raised \$1,500 for the American Cancer Society

MANRESA (FIRST YEAR ORIENTATION)

Xavier University

**Group Leader**

August 2023 & 2024

- Selected to serve as a leader to the freshman class and to be a role model / mentor by helping integrate them into college life and create relationships with classmates
- Named Move Crew Member of the Year; exemplified high energy, outgoing personality and leadership

LIFE AFTER SUNDAY

Xavier University

**Board Member (Treasurer & Vice President)**

December 2022 – Present

- Plan events including club meetings, worship nights, promotions, Masses, and dance functions
- Solely responsible for planning, raising, and managing \$5,000 for a trip to St. Louis for a conference in Jan. 2024
- Lead students to pursue their faith through bringing faith life to college students on campus in a fun, engaging, way while still allowing for deep connection
- Delegate to subcommittee to achieve club goals

DEAN STUDENT ADVISORY BOARD

Xavier University

**Vice President**

September 2023 – Present

- Lead a subcommittee of students to advise the Dean on changes to the Williams College of Business
- Plan WCB club day to exemplify Xavier's business community to national business school auditors

MUSKIES ON WALL STREET

New York City

**Attendee**

May 2024

- Selected to visit renowned firms including Goldman Sachs, Bloomberg, Spotify, and Deutsche Bank
- Exhibited strong ability to expand my network and gained experience in the real-world finance industry

## AWARDS, SKILLS, INTERESTS

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Private Pilot License – Fly small airplanes as a hobby

Summer 2024 - Present

**Eagle Scout** Recipient

April 2020

**Outgoing, Personal relationship focused, Self-starter**

Alpha Sigma Nu - Jesuit Honor Society Inductee

February 2024

# Alexander K. Nahigian

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## EDUCATION

### Miami University | Farmer School of Business

Bachelor of Science in Finance

Minors: Accountancy, Professional Writing

Oxford, OH

Expected Graduation: December 2026

Cumulative GPA: 3.96 / 4.00

## PROFESSIONAL EXPERIENCE

### Kohlberg Kravis Roberts (KKR) & Co.

*Selected Participant*

- ❖ Selected into KKR's undergrad program, participated in interactive workshops and networking sessions
- ❖ Interacted with senior investment professionals across multiple lines of business; private equity, credit, and real assets

New York, NY

November 2024

### Adventis

*Financial Modeling Instructor*

- ❖ Facilitates financial modeling boot camps covering concepts of accounting, valuation methods, and LBO transactions
- ❖ Spearheads campus-wide marketing efforts, successfully enrolling over 50 students year-to-date

Oxford, OH

August 2024 - Present

### American Investment Council

*Private Equity Research Analyst*

- ❖ Authored comprehensive quarterly private equity/credit reports highlighting industry trends; distributed to 80 funds
- ❖ Engaged with high-ranking Congressional members and attended economic hearings addressing current and new policy
- ❖ Delivered a briefing on intrinsic valuation methods to senior executives to inform member decision-making

Washington, D.C.

June 2024 - August 2024

### First Miami Student Credit Union

*Financial Planning Analyst*

- ❖ Forecasted company financials and proposed strategic fixed-income investments to cover historical losses
- ❖ Collaborated with 40+ committee members to deliberate internal improvements to drive a 10% larger customer base

Oxford, OH

September 2023 - May 2024

## LEADERSHIP & INVOLVEMENT

### William Blair Investment Banking Competition

*1<sup>st</sup> Place | Investment Banking Analyst*

- ❖ Derived intrinsic value of a fictitious company and advised on competitive positioning for a potential sale process
- ❖ Identified a buyer universe of 30+ potential strategic acquirers and financial sponsors based on select criteria
- ❖ Constructed a cohesive sell-side pitch deck and presented to William Blair partners and analysts; placed 1<sup>st</sup> out of 60+

Oxford, OH

October 2024 - November 2024

### Miami University Investment Banking Club

*Selected Member*

- ❖ Selected as 1 out of 12 participants from a pool of 150+ candidates to engage in technical and behavioral training
- ❖ Led weekly market discussions and M&A case studies to keep informed on the current market landscape
- ❖ Engages in club-organized networking calls with industry professionals across different functions of investment banking

Oxford, OH

October 2023 - Present

### Miami University Commercial Banking Club

*President of Finance*

- ❖ Crafted and taught a curriculum consisting of three statement forecasting and valuation methodologies to 90+ members
- ❖ Publishes LinkedIn newsletter with 400+ subscribers, analyzing mechanics that drive market behavior and performance
- ❖ Built leveraged buyout models in Excel, including operating model, debt schedule, and common equity waterfall

Oxford, OH

October 2023 - Present

### Cleveland Research Company Intercollegiate Stock Pitch Competition

*3<sup>rd</sup> Place | Equity Research Analyst*

- ❖ Realized 28% gain on Vertex Pharmaceuticals (\$VRTX) as a result of unrealized biopharma catalysts in 6 months
- ❖ Developed a case-sensitive Excel model with toggle controls to derive a target share price range for recommendation
- ❖ Worked closely with 4 analysts to deliver an investment proposal rooted in unrealized market catalysts in biopharma

Oxford, OH

February 2024 - April 2024

## SKILLS, ACTIVITIES, & INTERESTS

**Skills & Certifications:** Adventis FMC Level I & II, Bloomberg, Microsoft Office (Excel, PowerPoint, Word), Pitchbook, SQL

**Activities:** Author: Wrote a 120-page book titled *Distraction*, Weekly LinkedIn Newsletter: *Weathering Wall Street*

**Interests:** Chess, Classical Piano, Cleveland Sports, Golf, Premier League, Weight Training/Calisthenics, Youth Volunteering

# Caleb Pritchett

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Greater Cincinnati Area | Caleb.Pritchett@icloud.com | (682) 582-6666 | www.linkedin.com/in/caleb-pritchett

## Work Experience

### BNSF Railway | Drone Pilot

June 2023 - Present  
Fort Worth, TX

- Operate Small Unmanned Aerial Vehicles (sUAVs) to collect inventory data at a critical intermodal facility, monitoring container inflow and outflow.
- Perform routine drone maintenance, test flights, and train inspections to ensure safe and reliable operations across the BNSF network.

### BNSF Railway | Flight Coordinator

- Coordinate patrol routes for security personnel and aircraft across multiple states to safeguard high-priority goods during transit.
- Monitor and report service interruptions, dispatching agents as needed to maintain security and operational efficiency.

### Thomas More University | Resident Assistant

July 2024 - Present  
Crestview Hills, KY

- Provide leadership, guidance, and support to residence hall community, enforce university policy, mediate conflicts, organize educational and social programming, and collaborate with fellow RAs and staff to ensure smooth operation of housing facilities.

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## Education

### Thomas More University | Finance | Accounting

Aug. 2023 - Present  
Crestview Hills, KY

- Relevant Finance Courses: Business Finance, Personal Finance, Portfolio Management
- Relevant Accounting Courses: Principles of Financial Accounting, Principles of Managerial Accounting, Intermediate Accounting I, Intermediate Accounting II
- Hours Completed: 94
- Cumulative GPA: 3.95

### V.R. Eaton High School | Aviation and Aeronautics Academy

Aug. 2019 - May 2023  
Haslet, TX

- Weighted GPA: 5.42
- Unweighted GPA: 3.85

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## Extra-Curricular

### Monsignor Cleaves University Honors Program | Member

August 2023 - Present  
Crestview Hills, KY

### Thomas More University Men's Tennis | Athlete

Student-Athlete Advisory Committee | Representative

August 2024 - Present  
Crestview Hills, KY

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## Certifications

### Part 107 - Remote Pilot | Federal Aviation Administration

### CPR and AED | American Heart Association

# Nolan Rayner

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## EDUCATION

Bachelor of Science in Business Administration May 2026  
Haile College of Business, Northern Kentucky University, Highland Heights, KY  
Accounting & Economics Major, General Business Minor | GPA: 3.94

## ACCOUNTING EXPERIENCE

*Accounting Co-op, Messer Construction, Cincinnati, OH* Feb. 2025-Present

- Develop a variety of accounting reports using ViewPoint, perform routine bank reconciliations, and invoice processing
- Handle investment entries for acquisitions, sale of investments, and monitor investment portfolios
- Resolve accounting discrepancies and contract insurance matters to mitigate risk

*Accounting Clerk, The Shepherd Color Company, Butler, OH* May 2024-Dec. 2024

- Performed monthly cost runs within SAP S/4HANA, executed daily cash applications, and processed invoices
- Investigated potential application of credit insurance for international receivables
- Restructured pre-existing codifications for organizing company policies, forms, and procedures

## ACCOUNTING PROJECT

*TCI Pitch, The Shepherd Color Company, Butler, OH* July 2024

- Organized a pitch to acquire trade credit insurance against outstanding receivables for the CFO
- Analyzed 80/20 analysis to determine customer classification, dictated risk portfolio by country, and performed a cost analysis to determine the impact of the insurance on the business

## OTHER EXPERIENCE

*Data Impact Coordinator, NKU Center for Econ. Education, Highland Heights, KY* Jan. 2024-May 2024

- Evaluated data collection techniques for analysis and visualization creation
- Determined impact on Title 1 schools and students receiving financial literacy (FLC) education

*Package Handler, FedEx Ground, Independence, KY* May 2021-May 2024

## CAMPUS INVOLVEMENT

*Member, Emerging Leaders Club* 2023-Present

*Member, Beta Gamma Sigma* 2024-Present

- Recognized as one of the top 10% of undergraduate students in the Sophomore class (Spring 2024)

## COMMUNITY SERVICE

*Volunteer, One World Gala* 2024

- Organized seating for guests, prepared awards for donors, and coordinated decorative arrangements for the event

## SKILLS

- S/4HANA (SAP GUI and SAP Fiori)
- Microsoft Suite (Excel, Word, PowerPoint, etc.)
- ViewPoint

## AWARDS

*President's List, Northern Kentucky University* Fall 2023-Spring 2024

- Recognized for having a 4.0 grade-point average while being a full-time student

*Dean's List, Northern Kentucky University* Fall 2022-Fall 2024

- Recognized for having a 3.60-3.99 grade-point average while being a full-time student

# Rodrigo Sanchez

Fort Mitchell, KY 41017 | (859)443-0630 | rodrisanchezm7@gmail.com

## Summary

Dynamic and results-oriented financial auditor with a proven track record at Chamberlin Owen CPA. Possesses strong analytical skills and proficiency in various social media platforms and office technology programs. Committed to delivering high-quality work while continually seeking opportunities for professional growth.

## Skills

- Effective Time Management
- Fast Learner
- Communication Skills
- Accounting Software
- Proficiency
- Financial Reporting

## Experience

**AUDIT INTERN** | 01/2025 - Current

**Chamberlin Owen CPA - Crestview Hills, Kentucky**

- Credit Card Tests and Disbursements Tests.
- Generated reports and other essential documents to support opinions of licensed auditors.
- Analyzed balance sheets for mistakes and inaccuracies.
- Collaborated with audit team members to discuss findings and prepare audit reports.

**SECURITY GUARD** | 08/2022 - Current

**Cincinnati Bengals - Cincinnati, OH**

- Provided customer service assistance to staff and visitors in a professional manner.
- Enforced safety regulations and monitored access control points.
- Reviewed guest identification and employee credentials to authorize entry onto premises.

## Education and Training

**Thomas More University - Crestview Hills, KY | Bachelor of Business**

Accounting and Business Administration, Expected in 05/2026

GPA: 3.75

## Languages

- Spanish
- Portuguese
- English

# ANDREW J. SHAWBERRY

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4435 S Township Road 165  
Tiffin, OH 44883

**Current Address:**  
200 E High Street  
Oxford, OH 45056

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## EDUCATION & HONORS

**Miami University, Farmer School of Business** | Oxford, OH

Expected Graduation: May 2026

*Bachelor of Science in Business, Majors:* Accounting & Finance | **Certificate:** Deals

**GPA: 4.00/4.00**

**Honors & Achievements:** University Honors Cohort Member | President's List All Semesters (5x)

- **Governor's Scholarship Recipient:** Scholarship awarded for exceptional academic achievement in Seneca County area high school

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## PROFESSIONAL EXPERIENCE

**Lincoln International**

**Chicago, IL**

*Incoming Investment Banking Summer Analyst, Generalist*

*Summer 2025*

**Red Brick Capital**

**Oxford, OH**

*Junior Analyst*

*January 2025 – Present*

- Participate in the strategic management of a \$1.5M+ university endowment portfolio, optimizing sector allocations and analyzing securities to achieve long-term growth objectives as part of the Information Technology & Communications sector team

**Marathon Petroleum Corporation**

**Findlay, OH**

*Modeling & Analytics Intern, Investor Relations*

*May 2024 – August 2024*

- Generated peer comp models and consolidated financial metrics for earnings presentations using Bloomberg and sell-side models
- Prepared daily newsletter for companywide distribution covering industry trends, market news, and competitor performance
- Provided sell, idle, optimize, repurpose recommendation for refinery and integrated asset portfolio to executive management team

**Financial Design Agency of Ohio**

**Tiffin, OH**

*Investment Consultant Intern*

*May 2023 – August 2023*

- Evaluated client portfolios using Fi360 and Morningstar platforms, identifying investment opportunities and advising senior advisors
- Analyzed 401(k) performance for 40+ companies, leading to a universally adopted, diverse fund lineup implemented agency-wide
- Spearheaded the implementation of Redtail CRM, enhancing internal communication channels and data management efficiency

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## CAMPUS INVOLVEMENT

**Blue Sapphire Equities**

**Oxford, OH**

*VP, New Member Education*

*November 2024 – Present*

- Created and presented curriculum covering investment thesis generation, financial modeling, and technical analysis of securities

*Senior Analyst*

*November 2022 – December 2024*

- Contribute to the management of student-led investment portfolio consistently outperforming the S&P500 index since club inception
- Research investment opportunities utilizing Bloomberg data and industry analysis, applying discounted cash flow analysis, precedent transaction analysis, and comparable company analysis to evaluate value and risk associated with each security pitch

**East Bridge Consultancy**

**Oxford, OH**

*VP, Corporate Relations*

*November 2023 – Present*

- Source and coordinate projects for consultancy across a spectrum of companies, from small startups to Fortune 500 corporations
- Compose detailed statements of work and contracts for EBC and clients, outlining commitments and project specifics succinctly

*Project Manager*

*August 2023 – December 2023*

- Implemented IDIs, robust surveys, and strategic market analysis to devise a holistic expansion blueprint for a prominent guitar lesson nonprofit benefitting underserved youth, simultaneously optimizing and redefining KPIs to enhance donation acquisition

- Supervised diverse five-member consultant team and relations with nonprofit executive team, overseeing timelines and objectives

**Beta Theta Pi, Alpha Chapter**

**Oxford, OH**

*Alumni Relations & Mentorship Program Chair*

*November 2023 – Present*

- Manage recently overhauled mentorship program, pairing actives with alumni by career interests and coordinating speaker events
- Foster ties with the alumni executive board by attending conferences and curating monthly update letters on chapter achievements

**Alpha Kappa Psi Professional Business Fraternity**

**Oxford, OH**

*Director of Chapter Development*

*November 2022 – Present*

- Initiated member via an intensive 8-week process, including professional growth, 60+ interviews, and a Bain & Co. case competition
- Lead chapter development efforts via educational and career workshops, committee speakers, and provide 1:1 guidance to members

**Isaac & Oxley Center for Business Leadership ~ Emerging Leaders Consulting Experience**

**Chicago, IL**

*Student Consultant*

*January 2024*

- Engaged in an immersive program in Chicago focused on cultivating consulting skills, guided by seasoned EY professionals

- Collaborated with Mintel's Americas President, conducting employee interviews and research to pinpoint innovative AI solutions for enhancing internal operations and evolving customer-centric products with newly introduced commercial generative AI technology

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## ADDITIONAL INFORMATION

**Certifications:** Adventis FMC® Financial Modeling Level II Certification, Bloomberg Market Concepts


**Skills:** Excel, Financial Modeling, JMP, Microsoft Access, PowerPoint, Python, SQL Database


**Interests:** Automobiles, Fitness, National Basketball Association, Shark Week, The Highwaymen

# Jake Stokes

Undergraduate Student

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linkedin.com/in/ jakestanleystokes 

A driven student and a dedicated learner, both in and out of the classroom, with excellent analytical, logical, and interpersonal skills. Constantly looking for new opportunities to expand my knowledge with an unwavering commitment to honesty, integrity, and a strong work ethic.

## EDUCATION

### B.S.B.A. in Finance and Economics

Northern Kentucky University (Expected Graduation - May 2026)

08/2022 - Present

GPA - 3.98

Relevant Courses Taken

- Principles of Macroeconomics
- Introduction to Econometrics
- Fundamentals of Business Computing
- Intermediate Microeconomics
- Financial Management
- Principles of Microeconomics
- Financial Statement Analysis
- Principles of Financial Accounting
- Financial Planning and Estate Planning
- Investment and Security Analysis

## EDUCATIONAL EXPERIENCE

### Equity Research and Client Outreach Intern

Eisert Wealth Management

05/2024 - Present

Cincinnati, OH

Achievements/Tasks

- Conduct research and provide insights on market trends, economic indicators, and investment opportunities.
- Prepare financial reports and performance summaries for client meetings, ensuring data accuracy and clarity.
- Develop marketing materials and content for the firm's social media presence, contributing to brand awareness and client engagement.
- Prepare reports summarizing financial performance, risks, and opportunities.
- Collaborating with a veteran investor to understand market trends and proprietary trading strategies.
- Present various investment vehicles to clients, helping them make informed decisions to achieve their financial goals.
- Build and maintain relationships with prospects, fostering trust and understanding of their unique financial needs.
- Participate in client meetings and consultations, gaining insights into personalized wealth management approaches.

Contact : Terry Eisert - terry@eisertwealthmanagement.com

### Data Reporting Coordinator

Center for Economic Education

12/2023 - 03/2024

Highland Heights, KY

Achievements/Tasks

- Developed and implemented data-driven strategies to enhance engagement and effectiveness of financial literacy programs across high schools.
- Coordinated with multiple teams across various departments to collect and analyze data on educational outreach, significantly improving program reach and efficacy.
- Created dynamic spreadsheets and visual reports to track and showcase the success of the Financial Literacy dual credit module to academic stakeholders.
- Pioneered the use of analytics to evaluate the performance of social media campaigns for the Emerging Leaders Club, optimizing outreach efforts.
- Tailored data presentations to diverse audiences within the College of Business, ensuring clarity and actionable insights for all levels of academia.

Contact : Ryan Goss - gossr3@nku.edu

## SKILLS

Analytical Thinking

Strong Verbal and Written Communication

Mathematical Formula Application

PowerBI

Microsoft Office proficiency

Tableau

Canva

Financial Statement Analysis

Strategic Thinking

## ORGANIZATIONS

NKU Investment Club (09/2022 - Present)

President

Haile College of Business (10/2022 - Present)

Ambassador

Finance and Accounting Student Association  
(09/2022 - Present)

Member

Beta Gamma Sigma (02/2024 - Present)

Lifetime Member

National Society of Collegiate Scholars  
(02/2023 - Present)

Lifetime Member

## CERTIFICATES AND ACHIEVEMENTS

President's Honor List

Fall 2022-23, Fall 2023-24, Spring 2023-24, Fall 2024-25

Dean's List

Spring 2022-23

Commonwealth Excellence Scholarship Recipient  
(08/2022 - Present)

Federal Supplemental Educational Opportunity  
Grant Recipient (08/2022 - Present)

Diversity Scholarship Recipient  
(08/2022 - Present)