



BUTLER

UNIVERSITY

BULLDOG REPORTS
STUDENT-LED
EQUITY RESEARCH

EQUITY RESEARCH
CONFERENCE
APRIL 24, 2026

RESUME BOOK

Preston Asher

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EDUCATION

Butler University | Lacy School of Business

Bachelor of Science, Finance and Business Technology Major and Economics Minor

Indianapolis, Indiana

Expected May 2027

Ivy Tech Community College | School of Business

Associate of Science, Accounting and Business Administration Major

Indianapolis, Indiana

August 2021 – May 2023

FINANCE EXPERIENCE

JPMorgan Chase & Co.

Commercial and Investment Banking – Commercial & Specialized Industries – Summer Analyst

New York, New York

May 2026 – August 2026

- Synthesize complex industry, company, and market research into concise analyses, driving data-backed insights for senior bankers and deal teams.
- Structure credit assessments and cash management solutions in collaboration with commercial banking partners, optimizing risk-return profiles for mid-to-large corporate clients.
- Design client-facing materials, including pitch books and industry overviews, to articulate market positioning and financing alternatives for prospective and existing clients.

Roche Diagnostics

Enterprise Partnering and Strategic Planning Financial Analyst

Indianapolis, Indiana

May 2025 – Present

- Assist in financial planning and analysis by building models to forecast revenue trends and cost structures, enhancing data-driven decision-making.
- Conduct variance analysis on key financial metrics, identifying drivers behind budget deviations and providing strategic recommendations to senior analysts.
- Support cross-functional teams in financial reporting and operational efficiency initiatives, leveraging data visualization tools to communicate insights effectively.

Lacy School of Business – Bulldog Reports

Finance Intern – Managing Director

Indianapolis, Indiana

January 2025 – Present

- Lead a team of 45 students in producing 10 equity research reports annually, guiding analysts through 3-5 valuation models per report and detailed industry analysis.
- Direct the organization of an investor conference with 100+ attendees, securing participation from investors, equity research analysts, and company executives to discuss findings and facilitate networking opportunities.
- Oversee 5 cross-functional teams, ensuring alignment and high-quality reports resulting in a successful conference.

University Program Council

Vice-President of Finance & Operations

Indianapolis, Indiana

June 2024 – Present

- Identify and rectify financial inconsistencies through detailed audits and saving 15% in operational costs.
- Direct and mentor a cross-functional team of 25 members, managing event execution, programming, and workshops that increased engagement by 140% and exceeded manager expectations.
- Design and implement organizational initiatives, successfully integrating new systems that streamlined workflows and maintained a 96% staff satisfaction rate during transition periods.

Belterra Casino Resort and Spa

Financial Planning & Analysis Analyst / Revenue Auditor

Florence, Indiana

February 2023 – August 2024

- Developed a comprehensive market analysis and comparable dashboard, highlighting strategic growth opportunities including relative customer value, increasing operations efficiencies, and influencing key business decisions.
- Produced financial reports analyzing revenue and margin trends, enabling management to make data-driven decisions that improved growth opportunity and operational efficiency.
- Investigated disparities identified through audits, reconciling issues and implementing corrective measures to mitigate future risks and ensure accuracy.

SKILLS & CERTIFICATIONS

- FMI Foundations in Financial Modeling (3-Statement Model, DCF, LBO, Comparables)
- Microsoft Excel Associate (Microsoft 365) and Bloomberg: Market Concepts, Finance Fundamentals, ESG

Jacqueline Brasseale

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EDUCATION

Butler University | Lacy School of Business

Indianapolis, Indiana

Master of Business Administration

Anticipated December 2026

Bachelor of Science, Finance and Marketing

December 2025

- **GPA:** 3.8 / 4.0; Dean's list Fall 2023, 2025
- *Relevant coursework:* Investments, Corporate Finance, Macroeconomics, Statistics, International Financial Management, Wall Street Trek

EXPERIENCE

Verity Wealth Partners

Carmel, Indiana

Wealth Management Intern

August 2025 – December 2025

- Developed a social media strategy for the team by creating a plan aligned with Verity's brand.
- Provided detailed meeting recaps by documenting key discussion points, action items, and follow-ups to ensure clear communication across the team and with clients.
- Sat in on client meetings and assisted with the overall client experience by preparing the meeting environment to remain focused on client needs.
- Assisted with improving the client retention organization by supporting systems that promote long-term relationship management.

Eli Lilly and Company

Indianapolis, Indiana

Oncology Market Access Intern

May 2025 – July 2025

- Analyzed distribution models and networks of 10 leading oncology pharmaceutical companies.
- Assessed the impact of distribution strategies on key channel players.
- Developed an AI chat assistant to provide strategic recommendations for future product launches.
- Networked with internal teams and external industry professionals to gather insights on best practices and emerging trends in oncology distribution.

Butler University

Indianapolis, Indiana

Annual Giving Intern

August 2024 – May 2025

- Collaborated in the planning and execution of university fundraising initiatives, including Giving Tuesday and Day of Giving.
- Strategically organized marketing materials, social media content, and on-campus student engagement events.
- Managed 13 feature students for various fundraising campaigns after recruiting and interviewing.
- Maintained skills in Microsoft Office Suite, Adobe Creative Suite, and the university's fundraising database.

LEADERSHIP & ACTIVITIES

Athletes in Action

Indianapolis, Indiana

Volunteer

August 2022-Present

- Plans monthly gatherings for Butler athletes to foster connections and encourage young athletes in their faith.

Bulldog Reports

Indianapolis, Indiana

Vice President of Corporate Sponsorships

May 2025-Present

- Networks with companies around the Midwest to build relationships and raise sponsorships for the inaugural student-led equity research conference.

SKILLS & CERTIFICATIONS

- FMI Foundations in Financial Modeling (3-statement modeling, DCF valuation, relative valuation)
- CFA Investment Foundations Certificate
- Bloomberg: Market Concepts, Finance Fundamentals, ESG

Kiontae Carter

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EDUCATION

BUTLER UNIVERSITY | Lacy School of Business

Bachelor of Science, Finance

GPA: 3.2 / 4.0, **Major GPA:** 3.5/4.0

Organizations: Financial Management Association (FMA), Butler's DECA, Personal Finance, Business in Healthcare, and Collective of Professional Accounting Students

Relevant coursework: Intro to Investment Banking, Principles of Macroeconomics, Business Calculus, Intro to Accounting, and Statistics.

Indianapolis, IN

Expected May 2028

ROWAN-CABARRUS COMMUNITY COLLEGE

Dual Enrollment Program

GPA: 3.6 / 4.0; Honors List

Relevant coursework: Principles of Microeconomics and Quantitative Literacy

Salisbury, NC

January 2023 - May 2024

WORK EXPERIENCE

Bon Appétit

Food Service Worker

Indianapolis, IN

October 2025 – Present

- Prepped, measured and stored ingredients following strict safety and quality standards, ensuring consistent operational efficiency.
- Served customers and resolved issues while maintaining inventory, cash, and sanitation compliance, supporting smooth daily operations.

Horizons at St. Richard's Episcopal School

Program Intern

Indianapolis, IN

November 2024 – May 2025

- Collaborated with partners to plan enrichment activities, research field trips, and support fundraising and events
- Managed student enrollment and family communications

Food Lion

Cashier and To-Go Associate

Denver, NC

July 2024 – June 2025

- Managed cash and credit transactions totaling \$1,500 - \$2,000 daily, ensuring accurate financial handling.
- Increased efficiency of online order fulfillment

McDonald's

Crew Member

Harrisburg, NC

June 2022 – August 2023

- Analyzed customer trends to develop strategies toward efficiency and customer retention
- Trained new team members on store procedures, food safety standards, and service expectations to ensure consistent and efficient operations.

EXTRACURRICULARS ACTIVITIES

Goldman Sachs Possibilities Summit

January 2025 – December 2025

- Attended Goldman Sachs professional development events for resume writing, interviews, and career paths
- Networked with other aspiring High Finance professionals and Goldman Sachs bankers

Equitable Advisors Case Study

October 2025 – November 2025

- Created a personalized financial plan for a couple (through use of investments, retirement planning, and risk management); presented to a panel

SKILLS & INTEREST

- **Interest:** House (TV Show), Literature, and Gaming
- **Technical Skills:** Bloomberg Terminal, Business Analytics, Microsoft Office Suite (Proficient), Adobe Photoshop
- **Certificates:** Bloomberg Market Concepts (BMC), CFA Investment Foundations, Financial Modeling Foundations (FMI), Real Estate Broker License in NC, Project Destined CRE Fundamentals

Kiehl Christopher

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Education

Butler University, Indianapolis, IN

May 2028

Lacy School of Business, Finance and Marketing Major

- *Relevant Coursework*: Speech for Business, Legal Environment of Business, Principle of Microeconomics, Business Statistics, Real Business Experience
- *First Year Business Experience*: Collaborated in a team to develop and present a comprehensive business plan for a new venture, strengthening critical thinking, strategic planning, and presentation skills

Experience

Be You Be Cozy, Indianapolis, IN

January 2026-May 2026

Chief Financial Officer

- Managed a \$1,000 university-backed loan and allocated capital strategically across production, marketing, and inventory to maximize return on investment.
- Helped generate \$2,570 in total revenue by coordinating production, managing inventory, and ensuring cost-efficient purchasing.

Chicago Business Trek, Chicago, IL

April 2025

- One of nine students selected through a competitive application process to participate in an immersive career exploration program
- Engaged with alumni and industry professionals to gain insight into internships, career paths, and professional life in Chicago
- Visited the open outcry trading floor at the Chicago Board Options Exchange gaining exposure to real-time market operations and trading environments

Franklin School Apartments, Indianapolis, IN

July 2025-Present

Property Manager

- Assisted in daily operations of residential property management, updated lease agreements, collected rent payments, and handled tenant communications

Grand Park Bullpen, Westfield, IN

June 2023-August 2025

Manager of Field Operations

- Supported players, coaches, and officials by providing necessary equipment and on-field assistance throughout the day
- Acted as point of contact for parents and spectators, helping to maintain a safe and respectful game environment

Involvement, Recognition and Skills

Lambda Chi Alpha Member

Jan 2025 – Present

- Selected to join national fraternity focused on leadership, networking, and professional development

Problem Solving & Communication

- Creative problem solver, persuasive communicator, and collaborative team player

Professional Development

- Committed continuous learner with strong interest in business strategy and growth

Sean Clouse

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EDUCATION

Butler University | Lacy School of Business

Indianapolis, Indiana

Majors: Finance & Business Technology and Analytics

May 2028

- **GPA:** 3.89 / 4.0; Lacy Business Scholar; Honors Program; Dean's list Fall 2024, Spring 2025, Fall 2025
- *Relevant coursework:* Corporate Finance, Intro to Investment Banking, Business Applications of Excel, Microeconomics, Macroeconomics, Statistics, Real Business Experience, Intro to Python

WORK & LEADERSHIP EXPERIENCE

Bulldog Reports – Student-Led Equity Research Group

Indianapolis, IN

Analyst

Jan 2026 –

Present

- Conducted comprehensive research to create equity research report on Core Molding Technologies (CMT)
- Present findings to senior executives at on-site visit and investment conference of 100+ attendees

Vice President- Corporate Outreach

April 2025 – Dec 2025

- Identified and sourced 20+ investor relations & senior finance professionals at target companies
- Pitch analysis offerings to CEOs & CFOs at target companies, providing insights into the advantage of participation in Bulldog Reports Equity Research.

Aged Era – Real Business Experience

Indianapolis, IN

Chief Financial Officer

Aug 2025 – Dec 2025

- Partner with 5 classmates to create, market, and deliver an innovative product in 6 months with \$1k budget
- Managed finances using QuickBooks and conducted cash flow analysis, generating nearly \$2,000 in revenue

Parkview Community Church

Glen Ellyn, IL

Camp Leader

May 2025 – July 2025

- Collaborated with 25 staff to create and deliver a safe and fun experience for 125+ campers in 1st – 5th grade
- Effectively communicated with Camp Director, colleagues, parents, and campers in order to exceed expectations
- Navigated daily schedule changes and anticipated needs of campers in a dynamic and intense environment

Waverly Lawncare

Glen Ellyn, IL

Founder

April 2019 – Present

- Developed and distributed effective advertising campaigns to potential clients, increasing clients each year
- Surveyed properties & managed communications to ensure timing & quality of work exceeded expectations
- Created strong professional relationships, leading to 100% client retention and a high volume of referrals

Jimmy John's

Glen Ellyn, IL

Crew Member

April 2022 – August 2022

- Delivered exceptional customer service by accurately taking orders, addressing inquiries, and ensuring 100% customer satisfaction

CERTIFICATIONS, ACTIVITIES, & INTERESTS

- **Certifications:** CFA Investment Foundations, FMI Foundations
- **Professional Clubs:** Member of Personal Finance, Financial Managerial Association, Real Estate Club
- Butler Club Soccer Head of Communications, Delta Tau Delta Fraternity Head of Academic Affairs
- Fan of Green Bay Packers & Notre Dame Sports; enthusiastic player of water sports, pickleball & basketball

Richie Dallen

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EDUCATION

Butler University | Lacy School of Business

Indianapolis, Indiana

Bachelor of Science, Finance

Anticipated May 2029

- **GPA:** 4.0 / 4.0; Dean's list Fall 2025
- *Relevant coursework:* Intro to Investment Banking, Business Calculus, Financial Accounting

EXPERIENCE

Knollwood Farm

Hartland, Wisconsin

Assistant

June 2022 – August 2025

- Responsible for the daily care of show horses which includes specialized feeding and training of horses.
- Performed day to day maintenance of the barn from the cleaning to routine repairs on equipment.
- Client facing tasks to prepare and deliver horse for client's various lessons as well as interactions with clients to improve relations.

FBE Experience

Indianapolis, Indiana

CEO

August 2025 – December 2025

- Team 4Quality
- Tasked to develop a sustainability solution for Archer Daniel's Midland: a large, publicly traded company, focused in the food and agriculture industry.
- Planned company meetings, goals, and reviewed company products.
- Responsible for public speaking and leading group presentations.
- Achieved Top Dawg Finalist in Butler University's Top Dawg Sustainability Challenge.

Bulldog Reports

Indianapolis, Indiana

Research Analyst

January 2026-April 2026

- Conducted original research on the company of Portillo's.
- Prepared and presented a sell-side equity research report at an investor conference of over 100 attendees to conclude findings.

LEADERSHIP & ACTIVITIES

FMA

Indianapolis, Indiana

Member

August 2025-Present

- Participated in events held throughout the year to help network and teach Butler finance students.
- Opportunities to speak with industry professionals brought in to speak from the greater Indianapolis area.

USSSA Saddle Seat World Cup

3-Gaited Team Captain

December 2023-December 2024

- Top ranked rider on the US team that went to compete in Parys, South Africa in an international competition
- Made appearances around the United States to promote the competition and help raise funds to support each of the riders
- Awarded gold medal and the World Cup Trophy after a week of competition

5-Gaited Team Member

November 2025-Present

- Qualified at World Cup Trials held at William Woods University to compete as a part of the US team in Shelbyville, Kentucky

SKILLS & CERTIFICATIONS

- FMI Foundations in Financial Modeling
- CFA Investment Foundations Certificate
- Bloomberg: Market Concepts

Dominic Friend

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Education

Butler University, Indianapolis, IN **Expected Graduation May 2029**
Lacy School of Business, Finance Major

- *Relevant Coursework:* First Year Business Experience, Business Calculus, Business Ethics, Intro to Investment Banking, Bulldog Reports, Wall Street Trek

Experience

Official Finders, St. Charles, IL **June 2025-August 2025**
Soccer Referee

- Ensured players follow the rules of the game and assured the safety of 18-22 players at a time using strong communication and teamwork skills.

DeSitter Flooring, Bolingbrook, IL **June 2024-August 2024**
Warehouse Worker

- Maintained the warehouse by cleaning floors, organizing boxes, and disposing garbage.
- Received deliveries from flooring manufacturers to maintain the warehouse's flooring stock.
- Delivered flooring to clients who needed it for various purposes.

Butterfield Park District, Lombard, IL **May 2023-September 2023**
Lifeguard

- Closely monitored pool activities and safety issues for 30-40 children at a time.
- Opened and closed the pool each day, maintained a clean pool environment.

Involvement, Service, Recognition, Skills

Wall Street Trek **Spring 2026**

- Attended a 4 day trip to New York City to network with and learn from Butler alumni at investment banks

First Year Business Experience **Fall 2025**

- Innovated new business concepts and a fully developed business plan for a Fortune 500 company. Honed critical thinking, planning, teamwork, and presentation skills.

Butler University Financial Management Association (FMA) **Aug 2025-Present**

- Attend meetings to learn about future careers in finance, attend network events, hear from knowledgeable guest speakers, and expand understanding of the financial world.

Assistant Coach of a 7th/8th Grade Basketball Team **Winter 2022**

- Organized practices and plays for 10 regular season games and 3 playoff games.

Varsity Soccer Honorary Captain and Leader of Prayer **Fall 2025**

- Selected by coaches as an honorary team captain and one of two leaders of pregame prayer.

High School National Honor Society Member **2023-2025**

Certifications

FMI Foundations Certificate
CFA Institute Investment Foundations Certificate

Hunter Gray

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EDUCATION

Butler University, Lacy School of Business
Bachelor of Science in Finance and Risk Management

Indianapolis, IN
May 2029
GPA: 3.35/4.00

WORK EXPERIENCE

Milligan Park Pool

Head Lifeguard

Crawfordsville, Indiana

May 2023 - Present

- Supervised 6 guards during a 6 hour work period, ensured smooth daily operations.
- Monitored pool facilities and patron activity to maintain a safe and welcoming environment for 100+ visitors a day.
- Responded quickly and effectively to incidents ensuring positive outcomes.
- Promoted strong customer relations through professional communications and conflict resolution with them

Indiana Referee Association

Referee

Crawfordsville, IN

February 2018 – February 2024

- Officiated youth and adult sports games, ensuring fair play and a positive sporting environment.
- Managed on-field conflicts calmly and professionally, maintaining control and respect among players and coaches.
- Demonstrated quick decision-making under pressure to maintain game flow and participant safety.
- Communicated effectively with coaches, players, and spectators to explain rulings and promote sportsmanship.

ACTIVITIES & INVOLVEMENT

Butler Financial Management Association

Active Member

Indianapolis, IN

September 2025 – Present

Interact Club, Vice President

August 2023- May 2025

- Organized fundraiser to help children in Haiti get food and presents for Christmas

Chloe Hall

603-952-1720 | cmhall3@butler.edu | www.linkedin.com/in/chloehall/-

EDUCATION

Butler University | Lacy School of Business

Bachelor of Science, Finance and Economics Double Major

GPA: 3.96 / 4.00; Honors: Dean's list ('24, '25)

Relevant Coursework: Intro to Investment Banking, Accounting, Business Applications of Excel, Business Ethics, Microeconomics, Macroeconomics, Statistics, Wall Street Trek, Legal Environment of Business

Indianapolis, IN
Anticipated May 2028

EXPERIENCE

Medicus Healthcare Solutions

Incoming Financial Intern Summer 2026

Windham, NH
June 2026 – August 2026

- Support market research, financial analysis, and project-based initiatives within the healthcare services sector, with a focus on medical staffing, including industry and competitive analysis and data-driven insights.
- Collaborate directly with the CFO and finance team on strategic initiatives, analytical projects, and reporting.

Stifel Equity Research Bridge Program

NY Participant

New York City,
January 2026

- Interview-selected for a competitive, in-person early-insight program hosted at Stifel's NYC office.
- Participated in technical sessions, case discussions, and networking across institutional groups, with exposure to Investment Banking, Equity Research, and Fixed Income.

Private Venture Association

Committee Executive & Marketing Coordinator

Indianapolis, IN
May 2025 – Present

- Collaborated with a 4-person executive team to plan and execute outreach and association events, such as valuation competitions and speaker panels, aligning initiatives with organizational goals and member needs.
- Developed campaigns to increase engagement and retention, sustaining participation of over 100 members.

Real Business Experience - Bulldog Banner Co.

Established Bulldog Banner Co.

Indianapolis, IN
September 2024 – Present

- Founded and scaled a student-run business as CEO, led a 4-person team across strategy, go-to-market, operations, sales, and financial planning, achieving \$3,000+ in revenue and a 3.0x MOIC.

NH Tomahawks Girls Lacrosse

Coach and Trainer

Bedford, NH
June 2023 – Present

- Implemented practice plans, evaluated level of play, and delivered critical feedback to focus on team improvement and performance for two youth sports teams with 36 players.

ACTIVITIES & COMMUNITY INVOLVEMENT

Butler University Athletics - Women's Lacrosse

Present Team Member - Midfield

August 2024 –

- Division I scholarship athlete, demonstrating leadership, discipline, and accountability both on and off the field while contributing to team performance in a high level, high pressure competition environment.
- Dedicated 20 hours per week, 6 days a week, to training, team meetings, film reviews, and game preparation.

Elevate Ventures Sprint Week

Team Lead

April 2025

- Evaluated the investment potential of a \$1M Series B funding round for a gourmet dog food startup by analyzing financial statements and go-to-market strategies, delivering an exit valuation and recommendations.

Serving Outreach

Community Service Volunteer

August 2024 – Present

- Coordinating meal preparation efforts for homeless youth in the Indianapolis area, fostering a supportive environment by offering nutritious meal options to uplift those in need.

SKILLS & CERTIFICATIONS

- Bloomberg Market Concepts, CFA Investment Foundations Certificate, FMI Foundations in Financial Modeling, InvestU Investment Banking Workshop, Microsoft Office (Excel, PPT, Word)
- Lacrosse (High School All-American), Piano, Cycling, 4.25/4.00 GPA Windham High School, NH

Embry Clark Horal

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EDUCATION

Butler University | Lacy School of Business

Bachelor of Science, Finance and Music

Indianapolis, Indiana

Anticipated May 2027

- **GPA:** 3.5
- *Relevant coursework:* Investments, Crypto Currency, Corporate Finance, International Financial Management Accounting, Macroeconomics, Microeconomics, Statistics, Microsoft Excel, Real Business Experience.

EXPERIENCE

Silver Leaf Financial Management

Internship

Napa, California

March 2026

- Supported advisors managing client portfolios by tracking equity holdings and portfolio performance in Excel.
- Participated in client review meetings and prospective client meetings, discussing investment strategies, asset allocation, retirement accounts, tax nuances, and life insurance.
- Collaborated with external investment managers to discuss innovative portfolio options such as SMAs and ETFs.

Real Business Experience

Vice President of Sales

Indianapolis, Indiana

August 2024 – December 2024

- Generated a profit margin 64% and sold 95% of the inventory on hand by collaborating with a team of 5 students to launch and create the marketing campaign for the new product of a Butler-branded spatula.
- Increased consumer engagement by leading and organizing sales events, secured venues, and built brand awareness through social media outreach.
- Delivered profitability goals through effective financial planning and revenue forecasting.

Ironclad Solutions

Project Manager

Indianapolis, Indiana

May 2023 – Present

- Managed and led a construction crew that performed demolitions and helped renovate over 40 homes in the summers of 2023-2025 ensuring high-quality results and timely project delivery.
- Generated an average return of 32% return from renovated homes through effective leadership and exceptional end-product quality.
- Developed leadership and project management skills, influencing others by leading a highly functioning team.

LEADERSHIP & ACTIVITIES

Equitable Advisors Case Study Competition

Client Portfolio Analysis Competition

Indianapolis, Indiana

October 2025

- Competed in a case study competition developing a comprehensive financial plan.
- Analyzed client goals, financial profile, time horizon, and risk tolerance to deliver personalized financial recommendations. Earned 2nd place among competing teams by presenting strategic financial solutions in a structured goal-based framework.

Piano

Music Minor

Indianapolis, Indiana

2019-Present

- Performed at Butler University and multiple venues in Indianapolis demonstrating discipline, creativity, and public presentation skills.
- Volunteered at over 10 nursing homes by performing piano for senior citizens.

SKILLS & CERTIFICATIONS

- FINRA Securities Industry Essentials (SIE) Exam – Passed (March, 2026)
- Licensed Insurance Producer, Life & Health – Indiana Department of Insurance, License #22064055
- Bloomberg Finance Fundamentals Certification
- AI-900 Certification
- National Society of Collegiate Scholars

Kyle Johnson

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EDUCATION

Butler University | Lacy School of Business

Bachelor of Science, Finance

Indianapolis, Indiana

Anticipated May 2029

- **GPA:** 3.7 / 4.0
- *Relevant coursework:* Intro to Accounting, Microeconomics, Business Applications with Excel, Chicago Trek, Business Calculus, Business Ethics, Legal Environment of Business

EXPERIENCE

Crystal Lake, Illinois

March 2022 – Current

- Greet customers, assist in making homemade custard, prepare custom doughs for rotating flavors of the day, answer phones, wash dishes, cashier, create personalized custard desserts including cakes and pies, manage shifts as shift lead, and coordinate and expedite distribution of online orders and in person orders.

Crystal Lake, Illinois

October 2020 – Current

- Filing, special projects, and building maintenance

Woodstock, Illinois

Concessions/Cashier/Baker

October 2020 – Current

- Prepare various food items as requested, organize and stock stand before opening, expedite orders, and cashier. Bake bread, pies, and other various bakery items as needed and requested

Bulldog Reports

Research Analyst

Indianapolis, Indiana

January 2026 – April 2026

- Conducted original research
- Prepared and presented a sell-side equity research report

LEADERSHIP & ACTIVITIES

Indianapolis, Indiana

- Joined an Esports team Marvel rivals

Indianapolis, Indiana

October 2025 – December 2025

- Created and helped manage an intramural team this last fall

Butler University Philosophy Club

Member

Indianapolis, Indiana

October 2025 – Current

Financial Management Association

Member

Indianapolis, Indiana

September 2025 – Current

SKILLS & CERTIFICATIONS

- FMI Foundations in Financial Modeling (3-statement modeling, DCF valuation, relative valuation)
- CFA Investment Foundations Certificate

JACK KENNEDY

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630.815.1972

EDUCATION

Butler University – Lacy School of Business

Majors: Finance & Risk Management/Insurance

Indianapolis IN

Class of 2026

- Relevant Coursework: Algorithmic Finance, Applied Portfolio Management, Business Calculus, Corporate Finance, Employee Benefits & Retirement, Financial Management, Investments, Money & Banking, Organizational Behavior, Principles of Micro/Macroeconomics, Risk Management.

PROFESSIONAL EXPERIENCE

Financial Plans & Strategies, Inc.

Investment Advisor

Indianapolis, IN

May 2025 – August 2025

- Implemented automated contribution and withdrawal plans for client accounts in order to increase on time contributions and decrease administrative processing time.
- Used Altruist to track holdings, run scenario analysis, and flag tax loss harvesting opportunities for high net worth clients.
- Prepared asset allocation reports and identified rebalancing opportunities, contributing to portfolio performance monitoring for 600+ clients.
- Observed and contributed to initial client meetings and annual reviews, drafted client facing investment summaries via eMoney that improved advisor-client meeting efficiency.

Lovat Parks

Financial/Operational Analyst

London, UK

May 2024 – August 2024

- Supported £75m private equity acquisition by conducting competitor and park to park financial and operational analysis, influencing sales team growth strategy and go/no-go expansion into northern and western United Kingdom.
- Analyzed customer behavior via GA4, Hotjar, and Looker, identified trends in order to improve ad targeting.
- Created project timeline and led marketing team through a quality assurance initiative for new website before launch.

University Tees

Campus Director

Indianapolis, IN

Jan 2024 – Present

- Leading a team of four Campus Managers to \$250K in annual sales through on campus connections and targeted outreach.
- Providing clubs, businesses, and Greek chapters with the resources to design and order custom apparel and merchandise.

LEADERSHIP & INVOLVEMENT

Elevate Sprint Week

Participant

Indianapolis, IN

Spring 2025

- Developed practical experience in evaluating early-stage companies through financial analysis, operational assessment, leadership evaluation, and growth modeling.
- Strengthened investment decision-making skills by analyzing risk, scalability, and strategic positioning.

London Leadership

Summer Program

London, UK

Summer 2024

- Enhanced understanding of how to be an effective leader through case studies and group discussions.

Business Organizations

Active Member

Indianapolis, IN

Aug 2022 – Current

- Economics, Financial Management Association, Personal Finance, Private Venture Association, Risk Management.

Lambda Chi Alpha Fraternity

Initiated Brother

Indianapolis, IN

Spring 2023 – Current

- Lambda Academy Certifications: Essentials in Finance, Leadership Ready, Recruiting and Sales.

SKILLS & PERSONAL INTERESTS

- *Certifications: BMC, CFA Institute Investment Foundations, Envestnet, FMI Foundations, actively pursuing CFA I.*
- *Technical Skills: Excel, Financial Modeling, and GA4.*
- *Interests: Architecture, Classic Cars, Triathlons, Weightlifting.*

Oscar Kirch

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EDUCATION

Butler University | Lacy School of Business

Indianapolis, IN

Bachelor of Science, Finance, Accounting

May 2028

GPA: 3.95 / 4.00

Honors: Dean's List ('24, '25), Pioneer Football League Academic All-Conference ('24, '25)

Relevant Coursework: Intro to Investment Banking, Speech for Business, Excel for Business, Microeconomics, Macroeconomics, Accounting, Business Calculus, Statistics, Real Business Experience

EXPERIENCE

EO Advisors | Zionsville, IN

May 2026 – August 2026

Incoming Investment Banking Summer Analyst

- Selected through a competitive multi-round interview process as Incoming Summer Analyst at a lower-middle-market investment banking firm focused on M&A advisory and capital markets transactions
- Will assist with financial modeling, valuation analyses and preparation of client deliverables including CIMs, management presentations, and pitch materials
- Expected to conduct industry research, analyze company financials, and support transaction execution across live deals

InvestU (Butler University) Investment Banking Workshop | Indianapolis, IN

September 2025 –

Present Participant

- 1 of 5 students selected from class after two screening interviews and an exam; completed training in DCF, LBO, comps, and financial modeling
- Developed technical proficiency in Excel and valuation frameworks through hands-on modeling exercises
- Leveraged technical training and mentorship to successfully secure 2 future Investment Banking Summer Analyst internships (EO Advisors '26, William Blair '27)

FreshEdge Foods | Indianapolis, IN

June 2025 – August 2025

Operations Intern

- Performed yield studies and production data analysis across 2 out of Fresh Edge's 17 operating companies (Indy Fruit and Cibus Fresh) to identify cost drivers and process inefficiencies
- Built cost-variance and margin models in Excel and recommended adding one production line worker to alleviate bottlenecks, projected to increase daily output by ~8% and improve labor efficiency by 12%

LEADERSHIP, SPORTS, AND COMMUNITY SERVICE

Butler University Athletics

Indianapolis, IN

NCAA Division 1 Football, Linebacker

August 2024 – Present

- Balanced 30+ hours/week along with travel and rigorous academics
- Nominated to Student Athlete Advisory Committee and 2025 Team leadership council

Ball so Hard Basketball Tournament

Indianapolis, IN

Main Organizer

June

2023

- Took a lead role in organizing a 64-player, high-school boys' charity basketball tournament, overseeing logistics, and fundraising
- Raised \$1,500 for the Boys & Girls Club of Indianapolis

SKILLS, INTEREST, & CERTIFICATIONS:

- Interest: Smoking Meats, Golf, volunteering with Elevate Indy.
- Bloomberg Market Concepts, CFA Investment Foundations Certificate, FMI Foundations in Financial Modeling.
- Central Indiana National Football Foundation Scholar Athlete of the Year and Cathedral High School Student Athlete of the Year.

Japnam Kular

(917) 815-7416 | jkular@butler.edu | [Linkedin](#)

EDUCATION

Butler University | Lacy School of Business

Bachelor of Science, Finance and Marketing

Indianapolis, Indiana

Anticipated May 2029

- **GPA:** 3.4 / 4.0
- *Relevant coursework:* Introduction to Investment Banking, Wall Street Trek, Statistics, Introduction to Excel

EXPERIENCE

Butler University

Student of Office Activities Leadership Consultant

Indianapolis, Indiana

August 2025 - Present

- Review and approve student organization marketing materials for campus posting.
- Process cash reimbursement requests in coordination with university financial policies.
- Answer student inquiries and direct them to appropriate campus services.

Clint Wilson – State Farm

Intern

Fishers, IN

August 2024 – December 2024

- Coordinated and personalized customer engagement through thank you and birthday cards, enhancing client relationships.
- Developed, maintained, and optimized social media presence, driving brand visibility and audience engagement.

Goldfish Swim School

Front Desk Representative

Fishers, Indiana

June 2022 – Present

- Assist families with scheduling, enrollment and payment processing.
- Deliver feedback to instructors and help resolve parent concerns to maintain a positive experience for all guests.
- Promote programs through sales calls and facility communication to support enrollment.

Bulldog Reports

Research Analyst

Indianapolis, Indiana

January 2026 - Present

- Conducted original research on Signet Jewelers, focusing on operations, financials, and market positioning.
- Wrote a detailed equity research paper analyzing Signet Jewelers' performance and long-term growth potential.

LEADERSHIP & ACTIVITIES

Lilly Scholars Network – Butler Chapter

Co-Vice President of Professional Development

Indianapolis, Indiana

January 2026 - Present

- Assist in organizing professional events and supporting executive leadership tasks.

Financial Management Association

Member

Indianapolis, Indiana

August 2025 - Present

- Attend meetings and company visits to explore career paths within finance. Connect with alumni and industry professionals to strengthen financial understanding.

Lilly Endowment Scholar

Scholarship Recipient

Indianapolis, Indiana

August 2025 - Present

- Recognized for academic excellence and extensive community service; covers 95% of college costs.

Delta Gamma – Alpha Tau Chapter

Member

Indianapolis, Indiana

January 2026 - Present

- Chosen through a competitive recruitment process to become a member of a sorority dedicated to philanthropy and community service.

SKILLS & CERTIFICATIONS

- FMI Foundations in Financial Modeling (3-statement modeling, DCF valuation, relative valuation)
- CFA Investment Foundations Certificate

Matthew Lange

773-822-9457 | mclange@butler.edu | www.linkedin.com/in/matthew-lange-6b2074385

EDUCATION

Butler University | Lacy School of Business

Bachelor of Science, Finance Major

GPA: 4.00 / 4.00

Relevant Coursework: Intro to Investment Banking, Business Applications with Excel, Calculus, Microeconomics, Intro to Financial Accounting, Investment Foundations Certificate, Bulldog Reports, Business Ethics

Indianapolis, Indiana

Anticipated May 2029

EXPERIENCE

Bulldog Reports

Equity Research Analyst for Visteon Corporation

Indianapolis, IN

October 2025 – Present

- Selected to join a competitive student-led valuation program formulated to simulate the workflow of an institutional equity research desk.
- Initiating equity research coverage on a Midwest-based small-cap company, evaluating earnings calls and financial statements to construct financial models and deliver a professional investment recommendation
- Scheduled to conduct an on-site visit, including traveling to corporate headquarters to interview senior management and directors regarding business strategy aiming to solidify our initial investment thesis.
- Constructing comprehensive financial models and reports alongside a team of four (ESG, Financial Analysis, DCF, Valuation) to be presented at the first Bulldog Reports Investment Conference at Butler.

Mission BBQ

Front of House

Gurnee, IL

June 2023 – Present

- Delivered high-quality customer service by efficiently managing front-of-house operations, processing transactions accurately, and ensuring a welcoming dining experience
- Provided attentive and professional table service, including taking orders, coordinating with kitchen staff, and maintaining cleanliness and organization in the dining area
- Executed timely and accurate catering deliveries, ensuring proper setup, order accuracy, and strong client satisfaction through clear communication and reliability

LEADERSHIP & INVOLVEMENT

Private Venture Association

Member

Indianapolis, IN

August 2025 – Present

- Collaborate with a 50+ member group to attend and dig into various finance-focused events.
- Attend and participate in speaker events, featuring wide ranging professionals from top firms.

Financial Management Association

Member

Indianapolis, IN

August 2025 – Present

- Participate alongside 75+ members in listening to professionals from top firms and collaborating with groups of members in hands-on financial competitions such as case studies, mock portfolio management, and investment strategy.
- Visited Cincinnati and Louisville for a networking event hosted by Butler alumni and FMA officers that offered insight into ranging professional roles in the Finance market from Investment Banking, Corporate Finance, and Wealth Management.

Lacy Business Scholars

Member

Indianapolis, IN

August 2025 - Present

- Engaged as a LBS scholar through attending and participating in speaker events and volunteering to motivate potential incoming scholars while maintaining academic requirements.

Logan Marker

574-354-7671 | Lmarker@butler.edu | [linkedin.com/in/logan-marker-00c](https://www.linkedin.com/in/logan-marker-00c)

Education

Butler University, Indianapolis, IN Graduation: May 2028
Lacy School of Business, Double Major: Finance and Accounting, 3.74 GPA

- Butler University Honors Program
- CPA Certification Planned (150 credit hours in progress, 2028-2029)

Grace College, Winona Lake, IN Graduation: May 2025
Associates of Liberal Arts (completed at Northwood High School)

Certifications

CFA Investment Foundations | FMI Foundations in Financial Modeling | Microsoft Office Specialist Associate in Excel, PowerPoint, and Word

Academic & Applied Projects

Bulldog Reports – Equity Research Analyst Spring 2026 - Present

- Conducting fundamental analysis of a local publicly traded small-cap company, including financial statement analysis, industry research, and valuation.
- Developing comprehensive equity research report for presentation and publication through Butler University.

Projects & Case Experience Fall 2025 - Present

- Equitable Advisors Case Study – developed and presented a client-specific personal finance plan.
- Top Dawg Experience – built and pitched a sustainability initiative for a logistics firm.
- First Year Pitch Competition – delivered business analysis in a competitive, presentation-based format.

Experience

Butler University, Health and Recreation Complex, Indianapolis, IN February 2026 - Present
Fitness Floor Assistant

- Provide excellent customer service while maintaining a safe and welcoming environment for members.

Sullivan Group, Nappanee, IN December 2025 - January 2026
Seasonal Inventory & Operations Assistant

- Aided with year-end inventory counts and shipping operations, focusing on accuracy and reliability of inventory records. Assisted with packing and order fulfillment while meeting strict shipment deadlines.

Bellmart BP, Wakarusa, IN July 2023 - August 2025
Gas Station Attendant

- Independently opened and closed store, managed cash drawers, daily sales and deposits, maintained inventory. Trained new employees on POS systems, operational processes, and store standards.

Campus and Community Involvement

Financial Management Association (FMA) – *Member*
Private Venture Association (PVA) – *Member*

Butler University Accounting Club – *Member*
Indiana CPA Society (INCPAS) – *Member*

Campbell Mason

765-366-1927 | clmason@butler.edu | [linkedin.com/in/campbellmason](https://www.linkedin.com/in/campbellmason)

EDUCATION

Butler University | Lacy School of Business

Indianapolis, Indiana

Bachelor of Science | Major: Finance, Minor: Mathematics.

Anticipated May 2028

GPA: 4.00 / 4.00; **SAT:** 1500 / 1600 (750 / 750)

Relevant Coursework: Linear Algebra, Algorithmic Finance, Investments, Calculus & Analytical Geometry, Intro to Investment Banking, Corporate Finance, Business Applications of Excel, Macroeconomics, Microeconomics, Accounting I & II

EXPERIENCE

Stellata Partners

Austin, Texas

Investment Analyst

August 2025 – Present

- Source and analyze 100+ acquisition targets in data center infrastructure, HVAC, and solar energy, identifying high-margin, recurring-revenue businesses to assess growth potential and product market fit.
- Build integrated 3-statement financial models projecting income statement, cash flow, and balance sheet.
- Develop and present investment memos and pitch decks in PowerPoint to senior team members, showcasing industry outlook, key value drivers, market positioning, and risk considerations to inform investment decisions.
- Conduct equity research using Bloomberg to analyze valuation multiples across public comps, identifying drivers of premium valuations (e.g. recurring revenue, capital efficiency) and applying insights to fund acquisition screening.

Elevance Health (Incoming)

Indianapolis, Indiana

Corporate FP&A Intern

May 2026 – August 2026

- Selected for a Finance Internship at a Fortune 25 firm supporting budgeting, forecasting, variance and trend analysis, and large-scale financial reporting using Excel to inform senior management decision-making

Hurlow Wealth Management

Indianapolis, Indiana

Summer Analyst

June 2025 – August 2025

- Collaborate with senior advisors in the development of personalized financial plans, incorporating retirement, tax, and estate planning strategies, for a diverse client base totaling over \$650 million in assets under management.
- Evaluated portfolio exposure across market cap segments, identifying allocation drift and providing data-driven rebalancing recommendations to maintain consistency with the firm's investment mandate and target asset mix.

Bulldog Reports

Indianapolis, Indiana

Founder – Alumni Outreach

April 2025 – Present

- Led a team conducting outreach to 80+ firms, securing \$500–\$2,000 sponsorships for an equity research conference.
- Conduct valuation analyses and complete equity research reports on Midwest-based small-cap companies (<\$2B) utilizing the DCF and Multiples approach, supplemented with qualitative analysis to produce near term outlooks.

LEADERSHIP & ACTIVITIES

Financial Management Association

Indianapolis, Indiana

Vice President

April 2025 – Present

- Collaborate with a 4-person executive board to plan and execute finance-focused events for 75+ club members.

Phi Delta Theta

Indianapolis, Indiana

Social Event Coordinator

January 2025 – Present

- Oversee \$20K budget and direct all social operations for 82-member fraternity, organizing formal events, fostering chapter engagement, and ensuring efficient communication across members and partners.

AWARDS & CERTIFICATIONS & INTERESTS

- Awards; Lilly Endowment Scholar: 1 of 147 selected statewide for academic excellence and community impact.
- Certifications; Bloomberg Market Concepts, FMI Foundations in Financial Modeling, CFA Investment Foundations.
- Interests; Competitive swimming (Distance), Kayaking, Golf, Lego collecting, Film watching (Hayao Miyazaki), Travel (Year-long cross America road trip), avid Star Wars fan, Reading.

Braden Myers

317-619-8299 | bpmyers@butler.edu

EDUCATION

Butler University | Lacy School of Business

Indianapolis, Indiana

Finance & Accounting Double Major

May 2028

GPA: 4.00/4.00; Dean's list Fall 2024, Spring 2025, Fall 2025

Relevant coursework: Corporate Finance, Intro to Investment Banking, Investment Banking Workshop, Intermediary Accounting, Business Applications of Excel, Microeconomics, Macroeconomics, Statistics, Business IT, Business Law

FINANCE EXPERIENCE

Valeo Financial Advisors, LLC

Carmel, Indiana

Incoming Financial Planning Intern

Jun 2026 – Aug 2026

Geist Gas Group

Fishers, Indiana

Co-Founder | CEO

May 2025 – Present

- Build and maintain a client base of 25 through direct marketing and relationship management, offering a concierge fueling service where our company delivers and fuels our clients' watercrafts straight from their dock
- Provide our services via gas jugs with a higher octane of fuel at the same price as the local marina, making money on the margins, generating \$9,000 in revenue in the startup's first season while simultaneously scaling the business
- Oversee all financial functions including budgeting and expense tracking to maximize margins of \$1.50 per gallon, as well as reinvest proceeds to grow the company

Dawg Discount Cards

Indianapolis, Indiana

Co-Founder | CEO

Jan 2025 – Dec 2025

- Networked and negotiated with local restaurants to secure discounts to be included on our \$20 sellable discount cards
- Executed direct to consumer and B2B sales through pop-ups, online distribution, and organizational partnerships
- Generated \$6,100 in revenue in 2 months of selling with a 92.4% gross profit margin
- Pitched our product and financial results to Butler's Business School Faculty and won the Best of RBE (36 teams)

Knepp Financial Group

Fishers, Indiana

Summer Analyst Intern

May 2023 – Aug 2024

- Collaborated with the company's president to deliver personalized financial services to hundreds of clients gaining hands-on exposure to the advisory and investment planning process
- Built and maintained hundreds of client relationships, leading to the acquisition of over \$2M in new assets under management through a personally developed and executed sales pitch to prospective clients
- Expanded technical knowledge through real-world application of financial planning models, retirement strategies, and investment product structuring

LEADERSHIP

Butler University's Lacy School of Business

Indianapolis, Indiana

Dean's Student Advisory Council

Mar 2025 – Present

- Selected by Dean Caldwell and active council members to represent the student body and collaborate directly with the Dean
- Work to enhance academic and professional resources; provide actionable feedback on curriculum, student engagement, career readiness initiatives, and further growing the business school on the national scale

Butler Equity Research Group

Indianapolis, Indiana

Managing Director – Corporate Communication

Jan 2025 – Present

- Lead a team of 9 in cultivating new client relationships at mid-cap firms (500M-2B) for equity research coverage
- Spearhead strategic outreach to C-Suite executives to land 8 company partnerships through cold calls and/or emails
- Travel to company headquarters with an analyst to deepen our partnership and prepare for our equity research conference
- Manage a team of 4 analysts to help prepare, deliver, and pitch equity research reports for retail investor consumption

CERTIFICATIONS, ACTIVITIES & INTERESTS

- **Certifications:** Securities Industry Essentials (SIE), Bloomberg Market Concepts, CFA Investment Foundations
- **Activities:** Wall Street Trek, Chicago Trek, Club Basketball President, Delta Tau Delta Fraternity Member
- **Interests:** Indiana Sports Teams, Youth Sports Coaching, Golf, Lake Life, Snow Skiing, Poker, Creative Competition

TIMOTHY NELSON

(847) 257-5339 | tnelson2@butler.edu | [linkedin.com/in/tim-nelson00/](https://www.linkedin.com/in/tim-nelson00/)

EDUCATION

Butler University | Lacy School of Business

Indianapolis, IN

Bachelor of Science, Finance and Applied Mathematics Major

Expected May 2027

GPA: 3.95/4.00

Relevant Coursework: Equity Valuation, Financial Derivatives, Investments, Financial Mathematics, Corporate Finance, Statistical Theory, Probability Theory, IT, Linear Algebra, Computer Science (C++), Real Business Experience

FINANCE EXPERIENCE

Bulldog Reports – Butler University

Indianapolis, IN

Managing Director of Education – Assistant Lecturer of Finance

August 2025 – Present

- Deliver semester-long instruction to 63 students on investment banking concepts and financial principles
- Develop lesson plans, case studies, and supporting materials to reinforce technical and conceptual learning
- Partner with faculty and student specialists to prepare participants for a national investment conference
- Guide students in drafting and presenting investment theses with professional formatting and analysis

Wintrust Bank Chicago

Chicago, IL

Retail Banking Summer Intern

May 2025 – August 2025

- Provide professional banking services to retail customers spanning account activity, wire and ACH transfers, etc.
- Support commercial and investment partner's transactions through account management using FIS systems
- Complete federal and state banking regulatory training for all positions within retail banking
- Communicate across a broad span of banking partners and clients to achieve efficient financial management

Pebble Valley Wealth Management

Western Springs, IL

Financial Planning Summer Analyst

June 2024 – August 2024

- Programmed portfolio modeling code using Python, informing principal advisor on asset class distribution
- Designed visual models independently for new prospect pitches, resulting in multiple new clients
- Applied strategies including options, indices, capital markets, and portfolio management across \$100mm portfolio
- Expanded knowledge in wealth management principles, market trends, and personal finance through teach-ins

CFA Equity Research Challenge

Indianapolis, IN

Team Lead

October 2024 – February 2025

- Created investment thesis, valuation analysis and security research report on Simon Property Group (SPG)
- Conducted industry related diligence spanning Porter Analysis, competitive positioning, and industry dynamics
- Modeled key financial metrics and completed valuation analysis (DCF, Comparables, DDM, etc.)
- Led 5-person team and presented thesis to industry expert panel, recommending an 10% price appreciation

SKILLS & CERTIFICATIONS

- Proficient in Microsoft Office Suite, Bloomberg: Finance Fundamentals and Market Concepts
- Financial Modeling Institute: Foundations in Financial Modeling
- Experienced in producing deliverables across 3 coding languages: Python, R, C++

LEADERSHIP & CAMPUS INVOLVEMENT

Butler University DECA

August 2023 – Present

President

- Regulate financial transactions, direct fundraising opportunities, and manage \$40,000 annual budget
- Oversee a board of 7 student executives, creating and action plan impacting 200+ students through leadership
- Placed 1st internationally in Financial Statement Analysis, leveraging Microsoft PowerPoint and Excel skills

Braden Myers

317-619-8299 | bpmyers@butler.edu

EDUCATION

Butler University | Lacy School of Business

Indianapolis, Indiana

Finance & Accounting Double Major

May 2028

GPA: 4.00/4.00; Dean's list Fall 2024, Spring 2025, Fall 2025

Relevant coursework: Corporate Finance, Intro to Investment Banking, Investment Banking Workshop, Intermediary Accounting, Business Applications of Excel, Microeconomics, Macroeconomics, Statistics, Business IT, Business Law

FINANCE EXPERIENCE

Valeo Financial Advisors, LLC

Carmel, Indiana

Incoming Financial Planning Intern

Jun 2026 – Aug 2026

Geist Gas Group

Fishers, Indiana

Co-Founder | CEO

May 2025 – Present

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- Provide our services via gas jugs with a higher octane of fuel at the same price as the local marina, making money on the margins, generating \$9,000 in revenue in the startup's first season while simultaneously scaling the business
- Oversee all financial functions including budgeting and expense tracking to maximize margins of \$1.50 per gallon, as well as reinvest proceeds to grow the company

Dawg Discount Cards

Indianapolis, Indiana

Co-Founder | CEO

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Fishers, Indiana

Summer Analyst Intern

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- Built and maintained hundreds of client relationships, leading to the acquisition of over \$2M in new assets under management through a personally developed and executed sales pitch to prospective clients
- Expanded technical knowledge through real-world application of financial planning models, retirement strategies, and investment product structuring

LEADERSHIP

Butler University's Lacy School of Business

Indianapolis, Indiana

Dean's Student Advisory Council

Mar 2025 – Present

- Selected by Dean Caldwell and active council members to represent the student body and collaborate directly with the Dean
- Work to enhance academic and professional resources; provide actionable feedback on curriculum, student engagement, career readiness initiatives, and further growing the business school on the national scale

Butler Equity Research Group

Indianapolis, Indiana

Managing Director – Corporate Communication

Jan 2025 – Present

- Lead a team of 9 in cultivating new client relationships at mid-cap firms (500M-2B) for equity research coverage
- Spearhead strategic outreach to C-Suite executives to land 8 company partnerships through cold calls and/or emails
- Travel to company headquarters with an analyst to deepen our partnership and prepare for our equity research conference
- Manage a team of 4 analysts to help prepare, deliver, and pitch equity research reports for retail investor consumption

CERTIFICATIONS, ACTIVITIES & INTERESTS

- **Certifications:** Securities Industry Essentials (SIE), Bloomberg Market Concepts, CFA Investment Foundations
- **Activities:** Wall Street Trek, Chicago Trek, Club Basketball President, Delta Tau Delta Fraternity Member
- **Interests:** Indiana Sports Teams, Youth Sports Coaching, Golf, Lake Life, Snow Skiing, Poker, Creative Competition

Hannah Olson

507-696-8145 | heolson@butler.edu | <https://www.linkedin.com/in/hannah-olson-27529b28a/>

Education

Butler University | Lacy School of Business

Bachelor's in finance and marketing

Relevant Coursework: Equity Research, Intro to Investment Banking, IT, Managerial Accounting, Investments

Indianapolis, IN

Expected May 2027

Experience

GenOpp Capital

Investment Intern

Zionsville, IN

August 2025-Present

- Produced earnings report briefs for CIO, directly shaping investment decisions across \$50M portfolio
- Conducted equity/market analysis that identified banking industry insight, contributing to the investment pipeline

Vintage Dawg Threads

Chief Executive Officer

Indianapolis, IN

September 2024-December 2024

- Founded and scaled Butler vintage clothing venture, managing a 5-person team and full P&L
- Drove over \$4,000 in revenue and achieved a 40% profit margin in the first semester, creating a sustainable business model

CFA Research Challenge

Lead Market Analyst

Indianapolis, IN

October 2024 – February 2025

- Led market research of Simon Property Group (REIT) and used valuations, DCF, comps, and NAV models
- Delivered equity pitch to CFA judges; recognized for structure and template professionalism

Private Venture Association

Lead Financial Analyst

Indianapolis, IN

January 2025 – May 2025

- Awarded 1st place among 6 teams for venture valuation competition hosted by Elevate Ventures
- Modeled prospective seed-stage investment, recommending optimal funding structure and growth strategy

Butler University Residence Life

Resident Assistant

Indianapolis, IN

August 2025 – Present

- Fostered community for 40 residents; executed 10+ events that increased engagement.
- Resolved conflicts and supported student well-being, reducing escalations to Residence Life staff.

Skills & Certifications

Bloomberg Market Concepts (BMC)

- Terminal functions, financial markets navigation

Foundations in Financial Modeling (FFM)

- Excel modeling, DCF, comps, scenario analysis

Leadership & Extracurricular

Bulldog Reports

Treasurer

August 2023 – Present

- Managed \$9,000 budget; ensured financial sustainability and resource allocation
- Selected for competitive Wall Street Trek 2024, networking with top alumni and IB professionals in New York

Financial Management Association

Treasurer

August 2023 – Present

- Managed \$9,000 budget; ensured financial sustainability and resource allocation
- Selected for competitive Wall Street Trek 2024, networking with top alumni and IB professionals in New York

Residence Halls Association

Business Administrator

August 2023 - Present

- Directed \$10,000 budget; implemented financial reporting system, improving transparency
- Represented Butler at national housing conferences, elevating institutional visibility

DECA

August 2023 – May 2025

- Designed healthcare innovation solution for Ascension St. Vincent; pitched to executives
- Advanced to DECA Nationals (2024), presenting to industry leaders and judges

Ethan Payne

Fort Collins, CO | ejpaynepro@gmail.com | (970) 889-0807 | www.linkedin.com/in/ethan-j-payne

Work Experience

IMC Trading, Chicago, IL

June 2025 - August 2025

Research Analyst Intern

- Monitored event-driven strategies for summer earnings cycles by analyzing macro and firm specific catalysts across Consumer, Comms, and Utilities sectors.
- Identified exploitable options price action and regime shifts via volatility analysis and feature creation.
- Partnered with traders to monetize mispriced catalysts via directional mid-frequency options strategies.

Indiana Public Retirement System, Indianapolis, IN

May 2024 – August 2024

Investment Analyst Intern - Equities and Absolute Return Focus

- Conducted due diligence and managed relationships with General Partners (GPs) for capital allocation, contributing to a \$100M small-cap domestic equity mandate.
- Performed time-series analysis on 1,000+ hedge funds to filter funds for convex properties conducive to reducing overall portfolio losses in bull markets.
- Led a historical analysis of public equities to build predictive models, compile data, and generate reports assessing the impact of asset manager transitions on portfolio value.

Butler University Finance Department, Indianapolis, IN

February 2023 – Present

Student Research Assistant

- Developed & implemented statistical algorithms in R for quantitative analysis alongside Dr. Tom Hanson.
- Utilized cointegration and time series analysis to identify tradable equity pairs within the S&P 500, evaluating the efficacy of various cointegration tests for price prediction.
- Constructed financial models to identify buy, sell, and M&A opportunities for four mid- and small-cap companies, demonstrating proficiency in financial analysis and modeling.

Education & Training

Butler University, Indianapolis, IN

Expected Graduation: May 2026

Bachelor of Science (B.S.) in both Statistics and Finance, GPA 4.0/4.0

Minors: Data Science

- Relevant Coursework: Calculus II, Linear Algebra, Probability Theory, Statistical Theory, Financial Math, Investments, International Finance, Equity Valuation, Financial Derivatives, Economics, and C++.
- Certifications: Bloomberg Market Concepts, FMI Advanced Financial Modeling (AFM) Certification
- Industry Skills: Python, R, SQL, MS Office (Excel, Powerpoint, etc.), Tableau, Alteryx, SAS, C++.

Campus & Community Involvement

CFA Research Challenge – *Lead Modeler*

August 2023 - Feb 2024

- Led a four-person team in conducting financial analysis of Brown-Forman class B shares.
- Built industry-standard financial models (DCF, DDM, comps) using Excel to create a final PowerPoint and Word report to present recommendations, research, and analysis to expert judges.
- Estimated distribution of several assumptions to create a 100,000-iteration Monte Carlo Simulation.

Bulldog Reports - *Founding Board and Managing Director*

Jan 2025 - Present

- Taught & managed teams of 30+ students to perform financial modeling on Midwest Companies.

Financial Management Association – *Treasurer*

August 2022 - May 2024

- Spearheaded the management of a five-figure budget to support various club activities.
- Fostered a collaborative work environment to organize a 20-person career exploration trip to Chicago.

Alpha Kappa Psi (AKPsi) – *Event Planning Committee*

November 2022 - Present

- Planned and executed a successful career fair encompassing over 30 employers.

Dylan Price

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EDUCATION

Butler University | Lacy School of Business

Bachelor of Science, Finance

Indianapolis, Indiana

Anticipated May 2029

- GPA: 4.0; Fall 2025 Dean's List; Spanish Minor
- *Relevant coursework:* Intro to Investment Banking, Business Applications w/ Excel, Bulldog Reports

EXPERIENCE

Golf Club of Indiana

Cart and Pro Shop Staff

Whitestown, Indiana

April 2023 – Present

- Maintain all practice facilities and prepare and clean golf carts for customers.
- Clean facilities and ensure preparedness for next day while closing the barn.
- Answer phone calls and check-in customers while running POS register.

LEADERSHIP & ACTIVITIES

Bulldog Reports

Research Analyst, Portillo's

Indianapolis, Indiana

January 2026-Present

- Researching and analyzing a publicly traded small-cap company with a team of fellow students.
- Writing an equity research report to present at the Bulldog Reports Investment Conference.

Lacy Business Scholars

Member

Indianapolis, Indiana

February 2025-Present

- Selected to group through high school academic achievement and business studies.
- Gaining practical knowledge of the business world and working to educate others as a form of service.

Collegiate DECA

Member

Indianapolis, Indiana

September 2025-Present

- Attended workshops and networking events at the Collegiate DECA Fall leadership conference.
- Competing in a corporate finance case study against other students from across the country.

Competitive Pickleball Team

Member

Indianapolis, Indiana

September 2025-Present

- Competed in regional collegiate tournament with national bids at stake.

Financial Management Association

Member

Indianapolis, Indiana

September 2025-Present

- Listening to finance professionals discuss various careers and trends within the industry.

Equitable Advisors Case Study Series and Competition

Student Participant

Indianapolis, Indiana

November 2025

- Examined real-life case studies with financial professionals and made recommendations.
- Presented recommendations on a final case study with a partner and placed 2nd of 12 teams.

Brownsburg High School DECA Leadership Team

VP of Technology

Brownsburg, Indiana

August 2024-May 2025

- Created online holiday store for district staff and packaged and delivered over \$5,000 of merchandise.
- Completed a community giving project raising \$3,000 for domestic violence shelter, including a renovation.

SKILLS & ACCOLADES

- Reading, writing, and speaking Spanish with moderate proficiency
- Microsoft Office
- FMI Foundations
- CFA Investment Foundations

Thomas Rzasa

www.linkedin.com/in/thomas-rzasa | trzasa@butler.edu | 815-210-2364

EDUCATION

Butler University | Lacy School of Business

Indianapolis, IN

Bachelor of Science, Finance and Accounting

Expected Graduation: May 2028

GPA: 3.47/4.00

Relevant Coursework: Introduction to High Finance, High Finance Interview Preparation, Financial Accounting, Algorithmic Finance, Fundamentals of Income Taxation, Corporate Finance

EXPERIENCE

Horizon CPA Services

Carmel, IN

Wealth Advisory Intern

February 2026 - Present

- Analyze individual and corporate financial statements to evaluate tax implications on after-tax cash flow, liquidity, and long-term wealth planning
- Assist with tax-planning strategies, including entity structure, income timing, and liquidity events for high-net-worth individuals

Filotto Professional Services

Joliet, IL

Incoming Financial Analyst

Summer 2026

- Expected to support tax-aware financial planning through analysis of financial statements and cash-flow dynamics for businesses and high-net-worth clients
- Expected to assist with financial modeling, valuation, and liquidity planning analyses for client decision-making and long-term planning

Paradigm Shift Media

Indianapolis, IN

Private Equity Fall Analyst

October 2025 - December 2025

- Supported live deal evaluation for 20 private investment opportunities through financial modeling, benchmarking, and market analysis based on historical financials and market trends for investment and long-term value creation
- Advised on 5 post-acquisition strategy plans by conducting operational evaluations and identifying key value-creation levers, including pricing optimization, capital expenditures, and operational improvements affecting cash flow

GIS Benefits

Morris, IL

Financial Planning Summer Analyst – Business Advisory

June 2025 - August 2025

- Evaluated 250+ privately held businesses, with revenues greater than \$8M, by analyzing financial performance, growth sustainability, and risk factors for owner-level financial planning
- Analyzed revenue, cash-flow drivers, and operational metrics to identify long-term value creation and expansion opportunities across Midwest markets
- Presented 100 potential partnership opportunities to senior leadership using synergy analysis and cash-flow-based valuation models to estimate growth and value impact

LEADERSHIP & INVOLVEMENT

Elevate Venture Capitalist Case Competition

March 2025 - April 2025

Market Competitors and Industry Analysis Team Lead

- Assessed the competitive positioning and investment-focused insights of target company Kibbie's Dog Food by analyzing differentiation, barriers to entry, and sustainability in the economic environment
- Presented a comprehensive pitch deck to Elevate executives and placed 4th overall in the competition

Equitable Advisors Case Competition

September 2025 - October 2025

Project Lead

- Analyzed the comprehensive financial profile of a sample family and developed a long-term wealth plan addressing retirement readiness, investment strategy, risk management, and estate planning
- Led the team to a 4th-place finish by presenting our financial strategy to a group of 5 CFPs

SKILLS & CERTIFICATIONS

- Certifications: Bloomberg Market Concepts Certification, CFA Investment Foundations Certification, Financial Modeling Institute Foundations Certification
- Skills: Financial Analysis, Financial Planning, Cash Flow Analysis, Business Valuation, Investment Analysis, Private Company Analysis, Client and Executive Communication

LUKE SAND

Lsand@butler.edu | (612) 250-0512 | www.linkedin.com/in/Sand-Luke

EDUCATION

Butler University Lacy School of Business

Bachelor of Science in Finance. GPA 3.7 (4.0 scale)

Indianapolis, IN

Expected Graduation: May 2028

Jordan High School

Graduated Summa Cum Laude

Jordan, MN

June 2024

PROFESSIONAL EXPERIENCE

Tectum Companies

Eden Prairie, MN

Vice President

January 2026 – Present

- Co-founded a search fund targeting trade businesses after market research revealed notable succession opportunities among Baby Boomer-owned construction companies.
- Structured holding company architecture, including business trust and dual LLC formation to maximize asset protection and tax efficiency.
- Developed acquisition criteria and formed a decade-long vision with an execution framework.
- Launched Outdoor Living by Tectum, following market research that identified high-end opportunities in residential outdoor construction; utilized existing roofing industry expertise, relationships, and operational models to enter an adjacent market segment.
- Co-founded Rivus Drainage by Tectum with an emerging entrepreneur, expanding the portfolio into foundation waterproofing; provided operational guidance, capital structure, and business development to support the launch of a specialized drain tile division.

Tectum Contracting

Eden Prairie, MN

Business Development Consultant

January 2025 – Present

- Led an operational structure rebuild for an existing roofing company after acquisition; selected CRMs, determined technology stack, established supplier relationships with premium product offerings, and implemented a framework for hiring effective sales and installation teams.
- Identified a deteriorating insurance replacement market and successfully pivoted the company from storm replacement to the premium retail residential market; repositioned sales approaches, product mix, and customer acquisition channels to reach homeowners.
- Produced a total of \$858K in personal sales across 39 unique exterior construction projects.

Mighty Dog Roofing

Eden Prairie, MN

Commercial Sales Consultant

June 2024 – January 2025

- Co-led the creation of a commercial roofing division that generated \$750K in first year revenue and established a new growth vertical for the company.
- Sold 74 unique exterior construction projects, producing a total of \$1.48 million in personal sales.
- Conducted more than four hundred inspections and presented 200 estimate proposals, producing a 37% close rate.

COLLEGE LEADERSHIP EXPERIENCE

Financial Management Association

Indianapolis, IN

Bulldog Reports – VP of Relationship Development

May 2024 – Present

- Member since the inception of Bulldog Reports, an applied learning initiative that enables students to conduct equity research and financial analyses of publicly traded companies.
- Developed a target company pipeline and implemented a cold outreach campaign to source research opportunities, leveraging relationship-building skills to secure executive backing and company participation.
- Implemented a reach-out methodology that exceeded team benchmarks for response rate, leading to the adoption as standard operating procedure across the team.

REFERENCES AVAILABLE UPON REQUEST

Tony Santarelli

(815) 900-0275 | tmsantarelli@butler.edu | linkedin.com/in/tony-santarelli06

EDUCATION

Butler University | Lacy School of Business

Indianapolis, Indiana

Finance Major

Anticipated May 2029

- *Relevant coursework:* Intro to Investment Banking, First Year Business Experience, Speech for Business, Business Ethics.

EXPERIENCE

Target

Crystal Lake, IL

Guest Advocate

June 2024 - Present

- Helped customers quickly process returns, solve issues, and have a positive experience.
- Balanced bringing out drive-up orders, working at the guest service desk, and sorting returns during peak hours.
- Improve my customer service skills, problem solving, and cash handling/transactions.

Crystal Lake South Basketball Camp

Crystal Lake, IL

Coach

Summers 2023, 2024, 2025

- Planned and coached drill stations with groups of 10-15 campers.
- Coached and managed teams of 5-7 campers, leading practices and coaching during games.
- Served as a positive role model, improving my leadership skills, adaptability, and organization.

Lou Malnati's

Crystal Lake, IL

Dining Room Attendant

June 2023 – November

2023

- Maintained a clean and organized dining area to help with efficient table turnover and provide a positive experience for guests.
- Supported servers and front-of-house staff to improve service flow and respond to guests quickly during peak hours.

INVOLVEMENT & ACTIVITIES

Financial Management Association (FMA)

Indianapolis, Indiana

Member

September 2025 - Present

- Attend and participate in meetings helps me develop my financial knowledge/decision making and connect with other finance majors and professionals.

Club Basketball

Indianapolis, Indiana

Member

September 2025 - Present

- Competitive basketball team that practices twice a week and competes in games or tournaments on weekends.

Lacy Business Scholars

Indianapolis, Indiana

Member

August 2025 - Present

- Selective membership based on academic credentials of first year students.
- Attend meetings that help me gain knowledge of the business world.

SKILLS & CERTIFICATIONS

- FMI Foundations in Financial Modeling (3-statement modeling, DCF valuation, relative valuation)
- CFA Investment Foundations Certificate
- TestOut Pro Certified: Microsoft Office Essentials (Proficient in Excel, Word, and PowerPoint)

Statler D. Schmidt

(317) 604-6304 | sdschmidt@butler.edu | www.linkedin.com/in/statler

EDUCATION

Butler University | Lacy School of Business

Indianapolis, IN

Bachelor of Science, Finance and Business Technology Analytics Major, Economics Minor

May 2027

GPA: 3.91/4.00

Honors: Dean's List ('23, '24, '25), Robert E. Wildman Scholarship, Lacy Business Scholar, SGA Student Leader Scholarship, Edger C. Seitz, Sr. Memorial Scholarship, Phi Eta Sigma Founder's Fund Scholarship, Union Township Alumni Scholarship

Relevant Coursework: Equity Valuation, Algorithmic Finance, Investments, Money and Banking, Microsoft Excel, Data Analysis and Modeling, Microeconomics, Macroeconomics, Econometrics, Accounting, Corporate Finance, IT, Python, Wall Street Trek

EXPERIENCE

Wesleyan Investment Foundation

Fishers, IN

Finance Summer Intern

May 2025 - August 2025

- Analyze asset allocations for \$2.5bn asset manager to identify opportunities to optimize returns and manage risk
- Assist in portfolio management of 1,422 portfolio properties and diligence financials and risk factors for new investments

CFA Institute Research Challenge

Indianapolis, IN

Industry Specialist

October 2024 - March 2025

- Conduct research and analysis on Simon Property Group (SPG) and adjacent retail and real estate industry trends
- Build Discounted Cash Flow and Dividend Discount Model generating a 1-year target price and a buy rating (14.9% upside)

PawShield - Real Business Experience

Indianapolis, IN

Chief Executive Officer

August 2024 - December 2024

- Led 5-member team through business formation, negotiated contracts with suppliers, and generated 250 leads for the team
- Performed trend analysis and optimized product costs and marketing spend, resulting in profitability of \$1,500 in 4 months

Phi Eta Sigma - Butler University Chapter

Indianapolis, IN

Treasurer

August 2024 - Present

- Planned and secured \$4,500 in funding for executive team trip to 2024 Phi Eta Sigma National Convention in Los Angeles
- Oversee budget and assemble and present pitches to Student Government Association securing \$5,000 grant

SKILLS & CERTIFICATIONS

- Financial Modeling Institute: Foundations in Financial Modeling
- CFA Institute Investment Foundations
- Bloomberg Finance Fundamentals, Bloomberg Market Concepts, Bloomberg Environmental Social Governance
- Python Programming, Microsoft Office products

LEADERSHIP, SPORTS, AND COMMUNITY ACTIVITY

Residence Life - Butler University

Indianapolis, IN

Resident Assistant

August 2024 - Present

- Foster a supportive and inclusive environment for 30 students by organizing programs, mediating conflicts, and providing guidance to residents, ensuring a positive community experience

Office of Student Activities - Butler University

Indianapolis, IN

Student Leadership Consultant

November 2023 - Present

- Increased student organization enrollment by 18% through strategic initiatives, targeted engagement, and marketing efforts

Indiana Gymnastics Center

Greenwood, IN

Competitive Gymnast

December 2019 - February 2025

- Four-time Academic All-American accolades, 2nd place in national championship, and state championship title

Butler University Cheerleading Team

Indianapolis, IN

Coed Base

April 2025 - Present

- Represent Butler Athletics while developing teamwork, discipline, and time management through 15+ hours/week of training
- 2nd Place, 2025 UCA Collegiate Nationals (Gameday Routine); selected as one of five coed bases for national competition

Aaron Shields

309-826-7151 | ashields@butler.edu | linkedin.com/in/aaron-shields-b1bb9a27a

EDUCATION

Butler University | Lacy School of Business

Bachelor of Science, Finance & Risk Management Major

GPA: 3.96 / 4.00

Relevant Coursework: Financial Modeling, Microeconomics, Intro to Investment Banking, Business Applications of Excel, & Business Calculus

Indianapolis, Indiana

Anticipated May 2029

EXPERIENCE

Dale Carnegie Training

Professional Development Instructor

Bloomington, IL

June 2025 – August 2025

- Led development courses for teens and adults focused on communication, networking, and personal branding.
- Trained participants in key Dale Carnegie principles to enhance professionalism, leadership, and interpersonal effectiveness.
- Delivered engaging presentations on making introductions, standing out, and building confidence in formal settings.

InvestU

Remote Operations Quantitative & Qualitative Analyst Intern

Remote (Supporting NYC-based Executive)

November 2025 – Present

- Conduct in-depth competitor research and analysis across 10+ financial education platforms, providing the CEO with actionable insights on pricing and content strategy.
- Manage daily operations and growth strategy for the company's Instagram account and client outreach process by developing insightful financial content and AI automations to drive engagement for a specialized financial course.

Bulldog Reports

Equity Research Analyst

Indianapolis, IN

October 2025 – Present

- Selected to join a competitive student-led valuation program designed to simulate the workflow of an institutional equity research desk.
- Initiating coverage on a publicly traded, Midwest-based small-cap company, with the objective of producing a professional-quality investment recommendation.
- Scheduled to conduct on-site due diligence, including traveling to corporate headquarters to interview senior management and directors regarding business strategy.
- Constructing comprehensive financial models and reports alongside a team of five (DCF, relative valuation, ESG) to be presented at the first Bulldog Reports Investment Conference.

LEADERSHIP & INVOLVEMENT

Private Venture Association

Member

Indianapolis, IN

August 2025 – Present

- Collaborate with a 50+ member group to attend and dig into finance-focused events.
- Attend and participate key speaker events, featuring wide ranging professionals from top firms.

Financial Management Association

Member

Indianapolis, IN

August 2025 – Present

- Participate alongside 75+ members in listening to professionals from top firms and collaborating with groups of members in hands-on financial competitions such as case studies, mock portfolio management, and investment strategy.

Morton-Finney Diversity, Equity, & Inclusion (DEI) Scholar

Member

Indianapolis, IN

August 2025 - Present

- Engaged as a DEI Scholar in a meaningful program dedicated to fostering equity and inclusion through education, outreach events, and community service.
- Completed extensive volunteer work and campus-based projects to create a more inclusive and socially aware university environment.

Jake Silanskis

630-903-8632 | jsilanskis@butler.edu | <https://www.linkedin.com/in/jake-silanskis/>

EDUCATION

Butler University | Lacy School of Business

Indianapolis, Indiana

Bachelor of Science in Finance

Expected May 2029

GPA: 3.946

Relevant Coursework: Intro to Investment Banking, Wall Street Trek, Bulldog Reports, Intro to Accounting, Microeconomics, Business Ethics

EXPERIENCE

Butler University

Indianapolis, Indiana

Financial Research Intern

October 2025 – Present

- Analyzed financial statements, ESG disclosures, and earnings call transcripts across small- to mid-cap Midwest companies to identify trends and support equity valuation work.
- Synthesized Bloomberg ANR analyst research and market consensus data into concise reports used to inform valuation assumptions and investment theses.
- Built and maintained Excel-based ESG datasets, analyzing historical trends and linking sustainability initiatives to financial performance and valuation drivers.

LEADERSHIP & EXTRACURRICULAR

Financial Management Association

September 2025 – Present

Member

- Participate in finance workshops and technical training sessions focused on valuation, market analysis, and investment strategy.
- Collaborate with peers on case studies, stock pitches, and financial analysis projects to strengthen practical skills.

Wall Street Trek

January 2026 – February 2026

Member

- Selected for a competitive, donor-funded Wall Street Trek with on-site visits to leading investment banks including JPMorgan and Barclays, gaining direct exposure to firm operations and deal execution environments.
- Engaged directly with investment banking professionals and alumni to develop industry insights, expand network, and understand recruiting dynamics at top firms.

Bulldog Reports

January 2026 – Present

Analyst

- Student-led equity research and valuation program producing professional-quality reports on publicly traded small- to mid-cap Midwest companies using financial modeling and valuation techniques.
- Performed comprehensive company analysis and valuation, presenting investment recommendations to peers and faculty at the Bulldog Reports Investment Conference.

SKILLS & CERTIFICATIONS

- CFA Institute Investment Foundations Certificate
- FMI Foundations in Financial Modeling
- CFI Financial Modeling & Valuation Analyst (FMVA) – In progress
- CompTIA A+ IT Certification
- Microsoft Office Specialist: Microsoft Excel
- Microsoft Office Specialist: Microsoft Excel Expert

Gannon Smith

(765) 517-0537 | gsmith@butler.edu | [Gannon Smith LinkedIn](#)

EDUCATION

Butler University | Lacy School of Business

Bachelor of Science, Dual Major of Finance and Accounting

Indianapolis, Indiana

Anticipated May 2028

- **GPA:** 3.0
- *Relevant coursework:* Financial Accounting, Business Calculus, Macroeconomics, Speech for Business, Chicago Trek.

EXPERIENCE

Upcoming Cherry Bekaert

Audit Intern

Carmel, Indiana

January 2027 – April 2027

- Selected for Spring 2027 Audit Internship (busy season), gaining exposure to financial statement auditing, client engagement processes, and assurance procedures.

Golf Galaxy

Retail Associate

Castleton, Indiana

September 2024 – Present

- Secured sales by providing product knowledge and personalized recommendations to customers on golf equipment, apparel, and accessories.
- Maintain organized merchandise displays, restocked inventory, and ensure a professional store environment to enhance the shopping experience.

Thryve Fragrance

Co-Founder

Carmel, Indiana

Jan 2026 – Present

- Co-founded and operated a student-focused fragrance startup, managing product sourcing, pricing strategy, and go-to-market execution for a 4-product line within an 8-week sales cycle
- Led operations and inventory management, tracking ~100 units of initial stock, implementing Excel-based systems to monitor sales, low-stock thresholds, and order fulfillment

Bulldog Reports

Research Associate Analyst

Indianapolis, Indiana

January 2026 – Present

- Collaborating with a team of student analysts to produce an equity research and valuation report for a small-cap company and present findings at an investment conference.

LegacySafe

Co-Founder

Gas City, Indiana

June 2025 - Present

- Founded and developed LegacySafe, a digital platform for secure storage of sensitive information (passwords, documents, and legacy messages) with a focus on user privacy and long-term accessibility
- Designed core product features including encrypted data storage, trusted contact access, and user experience workflows to simplify legacy planning for individuals and families
- Conducted market research and iterative product development with mentor feedback, refining the platform's value proposition and positioning within the digital security and estate planning space

LEADERSHIP & INVOLVEMENT

Sigma Chi Fraternity

President

Indianapolis, Indiana

April 2026 – Present

- Incoming Chapter President (Summer 2026 – 2027) of Sigma Chi; elected by peers to lead chapter operations, oversee executive board, and drive recruitment, engagement, and strategic initiatives
- Will manage chapter governance, coordinate philanthropy and fundraising efforts, enforce risk management standards, and lead initiatives to improve academic performance and member involvement

Accounting Club

Member

Indianapolis, Indiana

September 2025 – Present

- Developing technical accounting skills through peer collaboration, guest speakers, and mock interviews.

Financial Management Association

Member

Indianapolis, Indiana

January 2025 – Present

- Participated in Financial Management Association meetings and speaker events to deepen understanding of financial decision-making and industry best practices.

Mason Strader

(847)393-5653 | mjstrader@butler.edu | <https://www.linkedin.com/in/mason-strader-67a051381/>

EDUCATION

Butler University Lacy School of Business

Bachelor of Science in Finance

GPA: 4.0/4.0; Dean's List Fall 2025

- Division I student-athlete who successfully navigates a full course load
- High School Honors: National Honor Society, Honor Roll, Captain of the football team

Indianapolis, Indiana

Anticipated May 2029

Certifications/Technical Skills:

- Investment Foundations (CFA): Completed six modules consisting of investment industry knowledge
- Financial Modeling (FMI): Completed training in financial modeling and analysis

WORK & LEADERSHIP EXPERIENCE

Bulldog Reports

Research Analyst

- Conducted an original sell-side equity research on MillerKnoll by analyzing financial statements, earnings reports, and industry trends to assess the firm's financial position and market outlook
- Obtained strong investment and communication skills through in-depth equity research, investment pitch presentations, and effective team coordination

Indianapolis, Indiana

January 2026-Present

Dean's Student Advisory Council

Member

- Selected to a competitive council advising LSB leadership, meeting with deans and administrators to present student feedback and contribute recommendations on curriculum, programming, and strategic initiatives
- Represented the student body in discussions, panels, and outreach events, synthesizing feedback from the broader student community and communicating actionable insights to school leadership to enhance the student experience

Indianapolis, Indiana

March 2026-Present

First-Year Business Experience

CFO

- Served as CFO for a student-led consulting firm in the First-Year Business Experience, managing all financial analysis for a project advising Callaway on innovative product adaptations and strategic improvements
- Evaluated cost structures, pricing, and financial performance to identify product and financial gaps, delivering data-driven recommendations to enhance profitability and market positioning

Indianapolis, Indiana

January 2026-Present

Tom Nelson Training

Coach

- Assisted in practices, mentored high school athletes in improving performance, teamwork, and college recruiting skills through in-person practices and hands-on training
- Obtained strong leadership, communication, motivational, and relationship skills through a coaching position

Mount Prospect, Illinois

January 2025-March 2025

Financial Management Association

Member

- Participated in discussions on equity markets, macroeconomic trends, and investment strategies with students and finance professionals

Indianapolis, Indiana

August 2025-Present

LEADERSHIP, SPORTS, AND COMMUNITY SERVICE

Butler University Athletics

NCAA Division 1 Football, Safety

- Balance 30+ hours per week of Division I football, travel, and academics while competing at the highest level of collegiate athletics

Indianapolis, Indiana

June 2025-Present

Link Crew

Student Leader

- Engaged in the guidance of high school freshmen throughout their first semester, with assistance in class scheduling, event supervising, and advice during twice-weekly meetings

Libertyville, Illinois

June 2024 - December 2025

Athletes in Action

Member

- A faith-based group focusing on Bible study, fellowship, and assisting the community

Indianapolis, Indiana

August 2025-Present

SKILLS & INTERESTS

Interests: Investing, macroeconomic trends, golf, fishing, football, baseball, skiing, weightlifting

Favorite Books: Young Money, Chop Wood Carry Water, Liar's Poker

Favorite Movies: Interstellar, Remember the Titans, Good Will Hunting, The Big Short

Alexander Urbina

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EDUCATION

Butler University | Lacy School of Business

Bachelor of Science, Finance and Accounting

Indianapolis, Indiana

Anticipated December 2027

- **GPA:** 3.86 / 4.0; Dean's List Fall 2025 / Honors Program / Lacy School of Business Scholar / La Plaza Scholar
- *Relevant coursework:* Investments, Corporate Finance, Financial Accounting, Macroeconomics, Statistics, Wall Street Trek

EXPERIENCE

Upcoming PNC Bank

Summer Treasury Intern

Indianapolis, Indiana

June 2026 – August 2026

- Expected to support PNC Treasury by assisting with client proposals, analyzing payment and cashflow trends, and learning how digital treasury solutions optimize capital.

Butler Financial Aid Office

Student Worker

Indianapolis, Indiana

September 2024 – Present

- Process client intake by reviewing, scanning, and validating financial documents.
- Maintain organized databases and generate spreadsheets to streamline reporting and information tracking to the office.
- Utilize financial software including Excel, Salesforce, Peoplesoft, and Oracle to support office operations.

L&N Detailing

Co-Founder

Carmel, Indiana

October 2020 – Present

- Co-founded and operate a small business, client relations, and growth. Manage budgeting, pricing strategies, and expense tracking.
- Scaled a startup service business to +\$40,000 in cumulative revenue within the first 24 months.
- Built and continue building a client base through marketing, sales pitches, and effective social media campaigns.
- Strengthen leadership, problem-solving, and organizational skills by balancing daily operations.

Bulldog Reports

Research Associate Analyst

Indianapolis, Indiana

January 2026 – Present

- Collaborating with a team of student analysts to produce an equity research and valuation report for a small-cap company and present findings at an investment conference.

LEADERSHIP & INVOLVEMENT

Morton Finney Diversity

Scholar

Indianapolis, Indiana

September 2024 – Present

- Selected as a Morton-Finney Diversity Scholar at Butler University for demonstrated leadership, academic excellence, and commitment to advancing diversity, equity, and inclusion.
- Participating in ongoing leadership development and community engagement, including monthly reflection, service, and cross-cultural collaboration projects.

Alpha Kappa Psi Professional Fraternity

Alumni Relations

Indianapolis, Indiana

September 2025 – Present

- A business fraternity which works on collaborating on professional development initiatives, financial literacy workshops, and networking events with industry leaders in finance and consulting.
- Strengthen alumni engagement by organizing outreach efforts and supporting networking initiatives between alumni and current members.

Sigma Chi Fraternity

Member

Indianapolis, Indiana

January 2026 – Present

- Member of a national fraternity emphasizing leadership, teamwork, service, and active engagement within the campus community.

Collective of Professional Accounting Club

Member

Indianapolis, Indiana

September 2024 – Present

- Developing technical accounting skills through peer collaboration, guest speakers, and mock interviews.

Personal Finance Club

Member

Indianapolis, Indiana

September 2024 – Present

- Gaining practical knowledge in budgeting, saving, credit management, investments, and retirement planning, with a focus on financial empowerment.

SKILLS & CERTIFICATIONS

- FMI Foundations in Financial Modeling (3-statement modeling, DCF valuation, relative valuation)
- CFA Investment Foundations Certificate (Investment industry concepts and financial markets)
- Bloomberg: Market Concepts (Market analysis and financial data interpretation)
- Envestnet Certificate (Wealth management and investment solutions)
- Bilingual in Spanish and English / Microsoft Excel / Oracle / Teamwork / Problem-Solving / Communication
- Golf / Fitness / Music / Football

Nathan Vanden Boom

630-246-0851 | nvandenboom@butler.edu | www.linkedin.com/in/nathan-vanden-boom-7a598a380/

EDUCATION

Butler University | Lacy School of Business

Indianapolis, Indiana

Bachelor of Science, Finance & Accounting Major

Anticipated May 2029

GPA: 3.8 / 4.00

Relevant Coursework: Financial Modeling, Microeconomics, Intro to Investment Banking, Business Applications of Excel, Intro to Accounting

EXPERIENCE

Schaumburg Golf Course

Schaumburg, IL

Cart Staff

April 2024 – Current

- Delivered consistent, high-quality customer service by assisting golfers with carts, directions, and on course needs to ensure a smooth and positive experience
- Prepared, organized, and maintained a fleet of golf carts, ensuring carts were clean, fully operational, and ready for peak daily usage
- Supported efficient course operations by managing cart flow, monitoring equipment condition, and helping maintain a safe, orderly environment during busy tee time

Schaumburg Park District

After School Counselor

October 2023 – May 2025

- Supervised and engaged up to 60 students in an after-school program, ensuring a safe, structured, and supportive environment during daily activities
- Led and organized daily activities while managing group dynamics, resolving conflicts, and maintaining order during high-energy settings

Bulldog Reports

Indianapolis, IN

Equity Research Analyst

October 2025 – Present

- Selected to join a competitive student-led valuation program designed to simulate the workflow of an institutional equity research desk.
- Initiating coverage on a publicly traded, Midwest-based small-cap company, with the objective of producing a professional-quality investment recommendation.
- Scheduled to conduct on-site due diligence, including traveling to corporate headquarters to interview senior management and directors regarding business strategy.
- Constructing comprehensive financial models and reports alongside a team of five (DCF, relative valuation, ESG) to be presented at the first Bulldog Reports Investment Conference.

LEADERSHIP & INVOLVEMENT

Private Venture Association

Indianapolis, IN

Member

August 2025 – Present

- Collaborate with a 50+ member group to attend and dig into finance-focused events.
- Attend and participate key speaker events, featuring wide ranging professionals from top firms.

Financial Management Association

Indianapolis, IN

Member

August 2025 – Present

- Participate alongside 75+ members in listening to professionals from top firms and collaborating with groups of members in hands-on financial competitions such as case studies, mock portfolio management, and investment strategy.

Nathan VanOtteren

(616) 888-4824 | nvanotteren@butler.edu | linkedin.com/in/nathanvanotteren/

EDUCATION

Butler University | Lacy School of Business

Indianapolis, Indiana

Bachelor of Science, Finance

Anticipated May 2028

- **GPA:** 3.4 / 4.0
- *Relevant coursework:* Business Ethics, Speech for Business, First-Year Business Experience, Microeconomics, Macroeconomics, Statistics, Accounting, Wall Street Trek

EXPERIENCE

Northport Youth Sailing School

Northport, Michigan

Sailing Instructor

June 2021 – August 2025

- Collaborated with fellow instructors to develop and implement improved teaching methods that enhanced student retention and success rates.
- Continuously updated personal knowledge of sailing practices, professional development, and ensuring top-quality instruction.
- Mentored junior instructors to help them refine their teaching styles and support the needs of diverse students.

Watermark Country Club

Grand Rapids, Michigan

Bag Staff

August 2022 – November 2023

- Acted as a valuable resource for customers seeking advice or recommendations on golf products or services offered at the facility.
- Developed strong relationships with members, fostering loyalty and repeat business for the organization.
- Promoted safety and the experiences on the course by constantly adhering to proper handling and storage procedures for golf bags and equipment.

Daily Dose

Indianapolis, Indiana

CEO

August 2024 – December 2025

- Collaborated with a team to launch a protein-focused product business providing shakes and other nutritional products for students.
- Planned and budgeted funds while monitoring the company's QuickBooks.

Bulldog Reports

Indianapolis, Indiana

Research Analyst

January 2026 - Present

- Conducted original research on publicly traded companies by analyzing financial statements, industry trends, and company fundamentals to support investment recommendations.
- Prepared and presented an equity research report, including valuation models, key risks, and a buy/hold thesis.

LEADERSHIP & ACTIVITIES

Alpha Kappa Psi Professional Business Fraternity

Indianapolis, Indiana

Vice President

December 2025 - Present

- Orchestrate chapter events, manage operations, oversee members, and support executive board initiatives.

Sigma Nu Fraternity

Indianapolis, Indiana

Philanthropy Director

November 2025 – Present

- Lead a committee of 4, directing all fundraising and philanthropic events towards the American Foundation for Suicide Prevention.

SKILLS & CERTIFICATIONS

- PADI Scuba Diving Certificate
- US Sailing Level 1 Instruction Certificate
- Red Cross CPR First Aid Certificate

Claire Venisnik

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847-521-8442

EDUCATION

Butler University

Indianapolis, IN

B. S. in Finance, Risk Management & Insurance

Expected Graduation: December 2027

GPA: 4.0- Dean's List (Fall 2024- Fall 2025)

Relevant Coursework: Introduction to Investment Banking, Wall Street Trek, Introduction to Microeconomics & Macroeconomics, Introduction to Accounting I & II, Corporate Finance, Life & Health Insurance

EXPERIENCE

Bulldog Reports

Indianapolis, IN

Equity Research Associate and Media Manager

January 2026-Present

- Research Patrick Industries to develop an investment thesis based on industry, financials, and risks.
- Collaborate effectively with team members, managing director, and mentors, seeking help when needed.
- Design pamphlets, LinkedIn posts, and media to advertise and provide logistics for the conference.

Equitable Advisors

Deerfield, IL

Retirement Benefits Group Summer Intern

June 2024 - July 2024

- Scheduled meetings and coordinated email and physical mail communications to over 1,500 clients on behalf of the financial advisor.
- Co-presented on "Artificial Intelligence in Financial Services" to educate advisors on the opportunities and limitations of the technology.
- Coordinated communications to over 1,500 clients on behalf of the financial advisor, by calling, emailing, and sending physical mail.

Financial Management Association at Butler University

Indianapolis, IN

Marketing Manager

April 2025- Present

- Developed and executed a comprehensive social media strategy, increasing follower count by 15% in the first 3 months.
- Design informational templates for advertising, boosting club membership by 60 students.
- Attended Finance Leaders Conference to collaborate with students from across the United States.

Anastasia's Restaurant & Sports Lounge

Waukegan, IL

Manager

July 2023 - Present

- Promoted from server to managing 15-20 staff per shift, utilizing a lead-by example approach.
- Resolve conflicts between customers by communicating in a calm and objective manner to successfully address the situation.
- Ensure compliance with food, alcohol, and gaming regulations to provide a safe and healthy environment for customers and staff.

HONORS, INVOLVEMENTS, & ACHIEVEMENTS

Goldman Sachs Virtual Insight Series

June 2025

HSF Scholar

November 2024

Dean's Student Advisory Council

March 2025- Present

- Represent student voice by acting as an ambassador for the Lacy School of Business.

Personal Finance Club, Vice President & Member

December 2024- Present

- Develop creative media and attend monthly meetings to make financial wellness topics available to all students.

Morton-Finney Diversity Scholars Program, Member

August 2024- Present

- Engage in 10+ hours of community service each month and attend semimonthly meetings.

Lacy Business Scholars, Member

August 2024- Present

- Volunteer as a panelist for prospective students to hear about my experiences at Butler.

Financial Modeling Institute, Foundations in Financial Modeling | CFA Institute, Investment Foundations Certificate | Bloomberg, Bloomberg Market Concepts Certificate | Microsoft Office Specialist, Expert | Microsoft Office Specialist, Microsoft Excel Expert

Noah Verner

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EDUCATION

Butler University | Lacy School of Business

Bachelor of Science, Finance Major

GPA: 3.89 / 4.00

Relevant Coursework: Financial Modeling, Microeconomics, Macroeconomics, Statistics, Accounting, Intro to Investment Banking, Business Applications of Excel, Business Calculus, Wall Street Trek

Indianapolis, IN
Anticipated May 2028

EXPERIENCE

Bulldog Reports

Equity Research Analyst

- Conducted in depth fundamental equity research on Calumet, analyzing its specialty products and fuels business model, cost structure, and exposure to crude oil and feedstock volatility.
- Traveled to Calumet headquarters to conduct company research and gain firsthand insight into operations and corporate strategy from senior management.
- Delivered engaging presentations on making introductions, standing out and networking, and building confidence in formal settings.

Indianapolis, IN
January 2026 – Present

Butler Blossoms

Chief Operating Officer

- Oversaw operations by coordinating production, inventory, and team responsibilities to ensure Butler Blossoms ran smoothly.
- Improved operational processes and workflows, helped team meet deadlines, and delivered consistent products to customers while generating \$3,200 in revenue and \$1,600 in profit.
- Analyzed sales and cost data to identify opportunities for pricing and cost optimization, contributing to stronger profit margins and more efficient resource allocation.

Indianapolis, IN
August 2025 – December 2025

LEADERSHIP & INVOLVEMENT

Financial Management Association

Member

- Engage with members to learn from professionals at top firms while working in teams on hands-on financial competitions, portfolio management, and long-term investment strategy.
- Applied financial concepts to evaluate market trends and investment opportunities, presenting recommendations and defending strategies in team-based discussions.

Indianapolis, IN
August 2024 – Present

Phi Eta Sigma

Member

- Invited to join a professional business fraternity based on academic achievements and success, provided service and leadership opportunities.
- Qualifications to be invited include having at least a 3.5 GPA as well as being in top 20% of students in your respective major.

Indianapolis, IN
August 2024 – Present

Lambda Chi Alpha

Member

- Participated in volunteer servicing and raised funds for philanthropy for other organizations.
- Fostered a welcoming environment and developed stronger teamwork and interpersonal skills through recruitment and events.

Indianapolis, IN
January 2025 – Present

CERTIFICATIONS

- FMI Foundations in Financial Modeling (3-statement modeling, DCF valuation, relative valuation)
- CFA Investment Foundations Certificate (Investment industry concepts and financial markets)
- Bloomberg: Market Concepts (Market analysis and financial data interpretation)

SKILLS & INTERESTS

- Microsoft Excel / Outlook / Teamwork / Problem-Solving / Communication
- Music / Basketball / Fitness / Football

Ezra Yoquelet

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EDUCATION

Butler University | Lacy School of Business

Bachelor of Science, Finance and Accounting Major

GPA: 3.6 / 4.0; Awards: Lilly Endowment Scholarship 2024

Relevant coursework: Intro to Investment Banking, Financial Accounting, Managerial Accounting, Microeconomics, Macroeconomics, Statistics, Business Calculus

Indianapolis, Indiana

Anticipated May 2028

EXPERIENCE

MPS Egg Farms

Summer Analyst

North Manchester, Indiana

June 2024 – August 2024

- *In-Progress*: strategic acquisition research of Project Egg for \$6M, to expand the 6th largest egg farm in the US
- Conducted M&A research on potential \$10-\$50M acquisition opportunities and presented findings and recommendations to executive leadership, and ultimately helped set into motion acquisition of Project Egg
- Evaluated business operations (i.e. picking, packing, and shipping) alongside egg production industry leaders
- Constructed competitive market analysis in the cage-free industry sector and advised on marketing strategies to help effectuate a turnaround of MPS's declining cage-free business segment

Paragon Landscaping

Crew Leader

New Haven, Indiana

May 2023 – August 2023

- Coordinated and executed delivery of efficient landscaping services, saving Paragon 40 labor hours per week
- Helped lead team to carry out and interpret instruction in a fast-paced and hands-on work environment
- Maintained 15 properties per week, increasing company productivity by 5-10%

LEADERSHIP & ACTIVITIES

Financial Management Association

Member

May 2025 – Present

- Prepare for a career in High Finance through networking and strategy-application investment competitions
- Analyze financial markets and apply investment strategies in club-managed and personal portfolios
- Given opportunity to network and learn from professionals in finance from across the country

Private Ventures Association

Member

August 2025 – Present

- Network with entrepreneurs to learn about business development and risk analysis
- Learning real world valuation skills through club equity research competitions

AvasVoice Ambassador

Ambassador

June 2024 – Present

- Advocate for Usher Syndrome through education and community events, including retreats
- Serve as role model for those with Usher Syndrome younger than me, and a beacon of guidance

USHThis Camp

Counselor

July 2022 – Present

- Provide support, guidance, and connection to young children with Usher Syndrome during summer camp
- Organize and facilitate activities to encourage participation and strengthen connections through teamwork

SKILLS, CERTIFICATIONS, & INTERESTS

- **Skills:** Proficient in ASL and Microsoft Office (including Excel, Power Point, and Word)
- **Certifications:** Bloomberg Market Concepts, FMI Foundations
- **Interests:** Tennis, Basketball, Films (Christopher Nolan), Football, WPT Poker, Art, and Weightlifting

Max Winders

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EDUCATION

Butler University August 2025-Present

Indianapolis, Indiana

Bachelor of Science in Finance

May 2028

- **GPA:** 4.0 / 4.0
- **Honors:** Dean's List, Scholar Athlete
- **Relevant Coursework:** Economics, Investment Banking, Accounting, Python, Equity Reports

Western Kentucky University August 2024-July 2025

Bowling Green, Kentucky

Bachelor of Science in Finance

- **GPA:** 4.0 / 4.0
- **Honors:** 2x Presidents List
- **Relevant Coursework:** Accounting, Microeconomics, Math Applications to Business

WORK EXPERIENCE

Bulldog Reports (Spring 2025)

Indianapolis, Indiana

Analyst

January 2026–Present

- Built DCF and other valuation models for a company with a 1.3-billion-dollar market cap.
- Completed executive summary and ESG reports on Bloomberg terminal
- Attended in-person conferences at the headquarters of the company

The Hinkle Headwear

Indianapolis, Indiana

CEO, Co-founder

August 2025–Present

- Launched a headwear company on Butlers campus selling 100+ hats in the first week of receiving product
- Developed entrepreneurship skills by overseeing full P&L management, marketing campaigns reaching 1,500+ students, and leading a 6-person team.
- Optimized the initial loan by reducing fixed and variable costs by 15–20%, extending runway and boosting early-stage ROI.
- Surpassed profit expectations by achieving 195% of forecasted revenue and converting 60% of early in-person marketing leads to sales.

LEADERSHIP EXPERIENCE

NCAA Division 1 Baseball

Student-Athlete, Right-handed Pitcher

Butler University

August 2025–Present

- Maintained a 4.0 GPA while balancing clubs, rigorous athletics, and networking

Western Kentucky University

August 2024–May 2025

- Developed discipline, resiliency, leadership skills, and a winning mindset
- In 2025, Western Kentucky (46-14) was nationally ranked as high at #17, won the Conference USA championship, and attended the NCAA Division 1 Ole Miss Regional

Madison Mallards | Northwoods League

Madison, Wisconsin

Right-handed Pitcher

May – July 2025

- Spent the summer in Madison, WI, pursuing baseball at a high level.
- Worked under pressure on a day-to-day basis. Avg. attendance per game was 6,202 fans.

SKILLS, ACTIVITIES & INTERESTS

Certifications & Training: Financial Modeling Institute Foundations program badge, CFA Institute Investment Foundations Certificate, Studying for the FINRA SIE certification

Clubs: Financial Management Association (Member), Private Venture Association (Member), Personal Finance Club

Activities: Student volunteer at organizations such as the Salvation Army of Bowling Green and Habitat for Humanity of Indianapolis. Led in community service hours for the WKU Baseball team.

Interests: DJ, Golf, Fishing, Running, Boating, Milk

Elizabeth R. Zwack

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EDUCATION

Butler University | Lacy School of Business

Indianapolis, Indiana

Bachelor of Science, Finance

Anticipated May 2029

- **GPA:** 4.0; Dean's List Fall 2025
- *Relevant coursework:* Intro to Investment Banking, Business Applications with Excel, Equity Valuation, Wall Street Trek, First Year Business Experience

EXPERIENCE

Godfroy, Wetzel & Jeffers, PLC

Monroe, Michigan

Assistant

January 2024 – January 2025

- Operated in a business environment and utilized different technologies to document case files and kept track of and delivered checks and cash to the bank
- Collaborated with senior office members and local government offices to deliver and communicate day-to-day operations

Bulldog Reports

Indianapolis, Indiana

Research Analyst

January 2026-April 2026

- Conducted original research with a team of fellow student analysts to create a detailed equity analysis research report and presentation of a publicly traded midwestern company
- Required critical thinking, skilled communication and teamwork skills, and provided the opportunity for real life application and networking with company officials

LEADERSHIP & ACTIVITIES

FMA

Indianapolis, Indiana

Member

Septemeber 2025-Present

- Prepared students for career planning, interview assistance, and provided multiple networking opportunities as well as informational, organized trips to different corporations and cities to gain a better understanding of the business world

DECA

Indianapolis, Indiana

Member

September 2025-Present

- Competed against fellow students in pitch competitions by studying and presenting case studies while working under the pressure of limited time
- Developed teamwork, communication, and creativity through helpful workshops as well as assistance and collaboration from older members

Lacy Business Scholar

Indianapolis, Indiana

Member

September 2025-Present

- Provide access to experienced faculty and professional mentors who coach students through their business ventures, and other opportunities to gain an understanding of the business world through service and education

Athletics

Monroe, Michigan

High School Tennis & Golf

September 2021-May 2025

- Demonstrated leadership as one singles (tennis) and experienced continued growth in communication, time management, and problem solving
- Four Year Varsity Player
- Two-time State Qualifier (Golf)

SKILLS & CERTIFICATIONS

- FMI Foundations in Financial Modeling (3-statement modeling, DCF valuation, relative valuation)
- CFA Investment Foundations Certificate
- Three years of French; French National Honor Society Member