

RAYMUND BOLTRON

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EDUCATION

The University of Iowa , Tippie College of Business Master of Science Finance and Master of Science Business Analytics	Expected 05/2022 GPA: 4.07/4.00
The University of Iowa , Tippie College of Business Bachelor of Business Administration Finance, Summa Cum Laude	05/2018 GPA: 4.05/4.00
CFA Level 2 Candidate , Chartered Financial Analyst Institute Passed CFA Level 1 above 90 th percentile.	May 2021

TECHNICAL SKILLS: Bloomberg, Aladdin by Blackrock, FactSet, Microsoft 365, Python (Deep Learning AI), JupyterHub, Microsoft Studio Code, SQL, Adobe Illustrator, MINITAB, HTML5, CSS5, WordPress, QuickBooks, Google Cloud Platform, Microsoft Azure

EXPERIENCE

Hedge Fund Analyst Intern , Continental Financial Capital, LLC <ul style="list-style-type: none">Initiated equity research and machine learning projects to support the women-led fund.Constructed databases to collect big data and developed a user-friendly interface for knowledge retrieval by the managers.	05/2021 – present
Investment Management Operations Intern , Aegon Asset Management <ul style="list-style-type: none">Responsible for investment reports to support the investment decision process in fixed income securities and derivatives.Involved in special projects to serve as a liaison between the Portfolio Managers, Research Analysts, and Settlement team.	01/2021 – present
Health Care Equity Research Analyst , University of Iowa, Henry Fund <ul style="list-style-type: none">Selected through a competitive application process to manage \$16.9MM endowed equity portfolio with 7 other students.Responsible for industry and company research in the Health Care sector and building robust financial models using discounted cash flows (DCF), economic profit, relative valuation, and dividend discount analysis.Present buy/sell recommendations and collaborated on sector weighting decision to the Henry Fund Advisory Board.	01/2021 – present
Teaching Assistant Coordinator , The University of Iowa <ul style="list-style-type: none">Assist more than 300 undergraduate students with the completion of projects and assignments, led small group discussions to review material, and enhance test prep.Hold weekly office hours to support homework and answer questions related to class lectures.Lead and collaborate with other TA's to complete weekly tasks and materials in preparation for class/lecture and support grading of assignments, projects, and exams.	08/2020 – present
Incubator Hedge Fund Manager , Bolts Holdings, LLC <ul style="list-style-type: none">Manage an incubator hedge fund with \$50,000 in liquid assets, achieving risk-adjusted returns above the benchmark.Institute a strict top-down fundamental approach to asset allocation and security selection.Develop and execute compliance, security, and performance-measurement infrastructure.	07/2020 – present
Staff Accountant , Marsh and McLennan <ul style="list-style-type: none">Administered clients' monthly invoices for St. Louis Schools, Sonos Inc., The Dow Hotels, NextGen Inc., Ross Stores Inc., and other sizable companies, covering more than 1 million insureds and more than \$100 million of revenue.Built formulas and macros in Excel that shorten a full day of processing into a 10-minute process.Successfully trained, coached, and provided leadership to an offshore five-person team on all accounting duties, providing them with tools and knowledge to perform tasks accurately and independently.	08/2018 – 08/2020

LEADERSHIP ACTIVITIES

University of Iowa Multicultural Start-up Think Tank , Founder/President <ul style="list-style-type: none">Led a group of 13 students from 5 different countries to pitch ideas to a group of peers and solve business problems.	01/2018 – 05/2018
Southeastern Hedge Fund 2021 Competition , Project Manager <ul style="list-style-type: none">Lead a team to innovate a hedge fund strategy and compete with PhD students against the top universities worldwide.Spearheaded to create the selection, risk-control, optimization, and back-testing models to implement our fund strategy.	02/2021 – 04/2021

ADDITIONAL INFORMATION

Series 65 Uniform Investment Adviser Law Exam, North American Securities Administrators Association 05/2020

LANGUAGES: English, Spanish, Filipino, Cebuano