

Caleb Tammen

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EDUCATION

The University of Iowa – Tippie College of Business Iowa City, IA
Master of Finance; Investments Concentration Aug 2023 – May 2025
Master's of Science, Business Analytics Aug 2023 – May 2025

The University of Wisconsin La-Crosse La Crosse, WI
Bachelor's of Science; Finance and Economics Major Jan 2020 – May 2023

CERTIFICATIONS

- CFA L2 Candidate, Bloomberg Market Concepts, Yale Financial Markets, Adventis Financial Modeling

EXPERIENCE

Henry Fund Iowa City, IA
Equity Research Analyst Jan 2024 – Present

- Selected through a competitive application process to manage a student-led \$21 million equity portfolio
- Conducted thorough industry and company research in the Healthcare sector and presented buy/sell recommendations to experienced asset management executives
- Forecasted valuations through discounted cash flow, residual income/economic profit, relative valuation, and dividend discount models

The University of Iowa – Tippie College of Business Iowa City, IA
Graduate Teaching Assistant Aug 2023 – Present

- Facilitated dynamic and engaging weekly discussion sections for two sections of Introduction to Management, fostering an interactive learning environment for a total of 90 students
- Provided personalized academic support by conducting weekly office hours, addressing students' questions, clarifying concepts, and offering constructive feedback, resulting in improved understanding and performance
- Developed tailored presentation materials for weekly discussion sections and comprehensive midterm and final exam reviews

WoodTrust Asset Management Wisconsin Rapids, WI
Research and Operations Intern Jun 2023 – Aug 2023

- Conducted in-depth fundamental research and security analysis, yielding six investment theses showcased to the Research and Investment committees, contributing to the enhancement of WoodTrust's portfolio strategies
- Assisted in the creation and upkeep of 20+ tailored presentation materials for client use
- Conducted manager due diligence, evaluating four current and potential investment managers, and contributing to WoodTrust's success through informed decision-making

Trane Technologies La Crosse, WI
Business Systems Analyst Intern May 2021 – Feb 2023

- Orchestrated and chaired weekly MWI meetings, delivering concise project updates to other teams and upper management
- Provided exceptional customer service, support, and training to 1,000+ end users for Trane North America
- Proactively detected and resolved billing discrepancies in the amount of \$1,000 - \$100,000 per invoice

LEADERSHIP

University of Wisconsin La-Crosse La Crosse, WI
Portfolio Manager – Gordon Spellman Fund Feb 2023 – May 2023

- Produced and delivered monthly and semesterly reports to inform analysts about current events
- Created insightful presentation materials for the Board of Directors, illustrating performance and offering strategic recommendations on the direction of the Fund
- Mentored analysts in due diligence, research, and their stock pitch, enhancing the quality of deliverables and elevating overall team effectiveness

Trane Technologies Tampa, FL
Business Systems Analyst Intern – Tampa Office Acquisition Jan 2023 – Jan 2023

- Trained and assisted 10+ Area Service Managers and Resource Coordinators on standard Trane processes
- Reviewed, edited, and created process documents to streamline future acquisitions
- Promptly billed \$1,000,000+ of unrecognized revenue from 100+ service agreements within the Tampa area

OTHER INFORMATION

Technical: Excel, PowerPoint, Word, Morningstar Office, FactSet, Bloomberg, SQL, R, Python