

Carter Turbett

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EDUCATION

The University of Iowa, Iowa City, IA

B.B.A. Finance (Early Graduation)

Aug. 2021 - May 2023

Master of Finance (MFin) & Master of Business Analytics (MSBA)

Aug. 2022 - Dec. 2024

COURSE HIGHLIGHTS

Financial Management

Financial Accounting/Reporting

Portfolio Management

Business Analytics

Wealth Management

Corporate Finance

SKILLS

VBA / Excel

Python

R

Financial Modeling

Tableau

SQL

Asset Allocation

Risk Management

WORK EXPERIENCE

Equity Analyst

Jan. 2023 – Present

The University of Iowa, Iowa City, IA

- Selected competitively to manage a student-run \$21 million endowment equity portfolio.
- Perform industry and company research along with valuation in the consumer staples and discretionary sectors, totaling 17% of the portfolio.
- Present Buy/Sell recommendations to the Investment Advisory Board and rebalance portfolio semi-annually.

Wealth Management Intern

Jun. 2023 - Aug. 2023

Scottsdale Wealth Advisory, Paradise Valley, AZ

During my last summer internship as a Wealth Management Intern, I had the opportunity to contribute to the client case planning process and various portfolio management tasks. My focus was conducting portfolio modeling and generating reports for clients. I utilized several specialized software platforms, including Advyzon, Riskalyze, Orion, and Kwanti, to enhance our wealth management services and deliver financial insights to our clients.

- Developed bond, CD, and T-bill ladders to optimize risk and return profiles, providing clients with investment options tailored to their financial goals.
- Assisted in the portfolio modeling process by analyzing various asset allocation strategies, back-testing historical performance, and running simulations to support decision-making.
- Played an active role in generating detailed reports for clients, highlighting their current financial positions, investment performance, and progress toward their goals.
- Collaborated closely with the wealth management team to identify, research, and evaluate potential investment opportunities and risks in the market.

Data Analyst Intern

May 2022 - Aug. 2022

Cottingham and Butler Insurance Services, Dubuque, IA

At Cottingham and Butler, I completed my main project which consisted of building/implementing the backend development of an online provider portal enrollment function. Clients could enroll via the portal to have access to their benefit packages. I also assisted in the creation of a comprehensive utilization report to identify and analyze trends in the portal.

- Developed the backend enrollment functions for an online provider portal.
 - Programmed rules that determined eligibility and available coverages based on inputted data points.
 - Provided an intuitive online experience for clients and their members.
- Assisted in the building and implementation of the online provider portal utilization report, using VBA and Tableau to show real-time insights.
- Decreased manual data entry by automating report generation utilizing VBA.

CERTIFICATION

Series 65 (The Uniform Investment Adviser Law) Exam

Feb. 2023

CFA Level II Candidate

(Sitting) Aug. 2024