CHARLIE PATTINSON

cwpattinson@gmail.com • 515-505-5069 • https://www.linkedin.com/in/cwpattinson/

EDUCATION

The University of Iowa — Iowa City, IA
Master of Finance — 05/2025
- Undergraduate-to-Graduate Program, CFA Research Challenge

The University of Iowa — Iowa City, IA
BBA, Finance • BBA, Business Analytics and Information Systems — 05/2024
- Minors: Computer Science, News and Media Literacy
- Iowa Scholars Award, Dean's List, GPA: 3.73
- Business Analytics Student Ambassador, Delta Sigma Pi Business Fraternity, London Winter Study Abroad

---

EXPERIENCE

University of Iowa — Iowa City, IA
Graduate Teaching Assistant, Principles of Microeconomics — 01/2025 – Present
- Lead three weekly discussion sections, facilitating students' understanding of core microeconomics concepts

Hart Fund — Iowa City, IA
Fixed Income Analyst — 01/2025 – Present
- Analyze fixed income markets and asset classes (IG, HY, MBS, Treasury) for a $1.5 million student-managed portfolio

Henry Fund — Iowa City, IA
Equity Research Analyst — 01/2024 – Present
- Selected through a competitive application process to co-manage a $27.0 million endowed equity portfolio
- Build robust financial models using discounted cash flows (DCF), combined with a strategic assessment of the business and industry to make buy and sell recommendations for the Communications sector
- Researched and presented investment recommendations for NFLX, GOOGL, TMUS, META, and DIS

Security Benefit — Des Moines, IA
Corporate Credit Analyst Intern — 05/2024 – 08/2024
- Conducted financial modeling and competitive analysis for Business Development Companies (BDCs) and presented findings to portfolio management team
- Supported due diligence and private placement process for whole-business securitizations across multiple sectors
- Executed trades totaling over $5 billion for commercial paper and public bond portfolios

Sammons Financial Group Asset Management — West Des Moines, IA
Investments Intern — 05/2023 – 08/2023
- Created dashboards in Blackrock Aladdin and Excel to monitor a $100 billion fixed income investment portfolio
- Wrote Visual Basic code to capture yield, duration, and spread to create performance analytics reporting

Nationwide — Des Moines, IA
Commercial Lines Portfolio Management Analyst Intern — 05/2022 – 08/2022
- Analyzed Nationwide's performance in restaurant industry insurance and communicated findings to multiple teams
- Diagnosed rating worksheet issues, created a solution, and presented product to executive team

---

TECHNICAL SKILLS

Investing: Bloomberg, FactSet, Bloomberg Query Language (BQL), Reorg, BamSEC, BlackRock Aladdin
Data Tools: Excel, Tableau, Power BI, Rattle | Programming Languages: R, Python, Java, SQL, Visual Basic