

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

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: 3.72
-

TECHNICAL SKILLS

Programming Languages: R, Python, Java, SQL, Visual Basic

Data Tools: Excel, Tableau, Power BI, Rattle

Investing: Bloomberg, FactSet, BlackRock Aladdin, Bloomberg Query Language (BQL)

Methodologies: Regression, Forecasting, Time Series, Decision Tree, Web Scraping, APIs

EXPERIENCE

Henry Fund Iowa City, IA
Equity Research Analyst 01/2024 – Present

- Selected through a competitive application process to co-manage a \$21.4 million endowed equity portfolio
- Responsible for building robust financial models using discounted cash flows (DCF), economic profit, relative valuation, and dividend discount models to value companies within the communications sector

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 \$100B fixed income investment portfolio
- Wrote Visual Basic code to capture yield, duration, and spread to create performance analytics reporting
- Built Bloomberg Launchpad templates to monitor fixed income markets and key macroeconomic indicators
- Utilized Power BI to visualize and communicate insights from trade reports spanning multiple asset managers
- Employed Bloomberg Query Language to compare portfolio attributes to benchmark indexes

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 potential solution, and presented product to executive team
 - Deployed Tableau and database skills to create a model to improve renewal reporting
-

LEADERSHIP & INVOLVEMENT

University of Iowa Iowa City, IA
Business Analytics and Information Systems Student Ambassador 10/2022 – Present

- Hired by Tippie College's Business Analytics Department to improve and develop recruitment efforts
- Organized multiple recruitment events and presented to prospective students at information sessions

Delta Sigma Pi Business Fraternity 02/2021 – Present

- Elected by peers to serve the organization through multiple leadership positions and committees

Tippie Business Honor Society 02/2021 – Present