

JACK WELLS

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EDUCATION

THE UNIVERSITY OF IOWA Iowa City, IA
Master of Science, Finance 12/2021

THE UNIVERSITY OF IOWA Iowa City, IA
Bachelor of Business Administration, Finance 05/2020

- Tippie College of Business Direct Admit, Spanish Minor, 3.71 GPA
- Old Gold Scholarship, Prappas Ethics Essay Finalist, Phi Delta Theta

INSTITUTE FOR INTERNATIONAL EDUCATION OF STUDENTS Barcelona, Spain
Study Abroad 01/2019 – 05/2019

EXPERIENCE

HENRY FUND Iowa City, IA
Technology Sector 12/2020 – Present

- Selected through a competitive application process to manage a \$16.9mm endowed equity portfolio with 7 other students
- Conduct equity valuations using DCF, DDM, and relative valuation models and create written reports to detail my analysis
- Present buy/sell recommendations to the Henry Fund Advisory Board and determine portfolio weightings as a team

FINANCIAL INFORMATION TECHNOLOGY Iowa City, IA
Teaching Assistant 08/2020 – Present

- Selected to help four adjunct professors teach applications of financial software and data systems to 130+ undergrads
- Conducted weekly virtual and in-person office hours to help students become more proficient with finance technologies

UNIVERSITY OF IOWA APPLIED FINANCIAL ANALYSIS PROJECT Iowa City, IA
US Bank Consultant 08/2020 – Present

- Worked with US Bank using Tableau and R to analyze mortgage servicing rights and held-for-investment mortgage portfolios as a part of graduate team over 16 weeks

MANDELA WASHINGTON FELLOWSHIP Kumasi, Ghana
International Business Intern (Remote) 05/2020 – 08/2020

- Collaborated with the CEO of a Ghanaian dairy production company to create solutions for their pricing model
- Assisted with my supervisor's NGO to provide renewable energy and resources to rural areas in West Africa

KRAUSE FUND Iowa City, IA
Equity Research Analyst, Financial Sector 08/2019 – 12/2019

- Wrote a research report and presented valuation to a board of financial professionals with a buy/sell recommendation
- Analyzed economic and industry trends and built financial models using DCF, DDM, and comparative company analysis to value Wintrust Financial Corporation

INTRO TO FINANCIAL MANAGEMENT Iowa City, IA
Teaching Assistant 08/2019 – 12/2019

- Collaborated with 25+ other TA's to teach fundamental valuation concepts and their applications to 230+ students who worked in groups in a flip-classroom environment

GROUP O Milan, IL
Accounting & Marketing Intern 05/2019 – 08/2019

- Tracked Receivables for 50+ clients and used NAV and Excel to code, pay, and digitally file invoices and purchase orders
- Created and presented PowerPoints highlighting research on potential clients for the marketing division

ACTIVITIES & LEADERSHIP

UI DANCE MARATHON Iowa City, IA
Fundraiser/Dancer 02/2018 | 02/2020

- Raised \$1,605 for children battling cancer at the University of Iowa Stead Family Hospital

TECHNICAL SKILLS: Microsoft Office Suite, Bloomberg, FactSet, Tableau, R