

PROFESSIONAL SUMMARY

Investment analyst supporting **\$650 million** of client assets with direct experience in company modeling, earnings analysis, investment memos, portfolio construction, and tax-aware implementation. CFA Level II candidate focused on fundamental equity research.

PROFESSIONAL EXPERIENCE

Stonegate Wealth Partners | Atlanta, GA

Jul 2023 - Present

Investment Analyst

- Support portfolio construction and monitoring for **\$650 million** across 180 high-net-worth households, evaluating sector, factor, liquidity, and concentration exposures.
- Maintain earnings and valuation models for 14 U.S. equities across payments, exchanges, and asset managers; update revenue drivers, margins, EPS, and target prices after results.
- Authored eight investment memos combining company filings, channel research, competitive positioning, catalysts, and downside risks; three ideas entered client portfolios.
- Built a tax-aware rebalancing tool that reduced manual review time **40%** and improved consistency across account restrictions.
- Produced quarterly performance attribution across asset allocation, security selection, income, and fees and explained material drivers in portfolio-manager and client-review materials.
- Completed manager diligence on 20 active funds by comparing process, holdings, factor exposures, drawdowns, fees, team stability, and benchmark-relative performance.

Stonegate Wealth Partners | Atlanta, GA

May 2022 - Aug 2022

Investment Intern

- Screened 120 dividend-growth equities and summarized balance-sheet strength, earnings durability, valuation, and portfolio fit for the investment committee.
- Maintained earnings calendars, consensus updates, and valuation snapshots for portfolio holdings before investment-team meetings.
- Prepared client-review books summarizing allocation, security performance, income, realized gains, and portfolio changes.

EDUCATION

Georgia State University - J. Mack Robinson College of Business

May 2023

B.B.A. Finance | GPA: 3.76/4.00; CFA Level II Candidate

SELECTED FINANCE PROJECT

Payments Equity Initiation Report | Independent

Mar 2026

- Built a three-statement forecast and DCF for a fictional payments processor using volume, take-rate, transaction-cost, and operating-expense drivers.
- Wrote an initiation report presenting thesis, valuation, catalysts, variant view, and risks under bull, base, and bear cases.

TRAINING & CREDENTIALS

CFA Level II Candidate. Continuing education in equity valuation, financial-statement analysis, portfolio management, economics, ethics, and fixed income.

LEADERSHIP & ACTIVITIES

CFA Level II Candidate; Georgia State Finance Society Alumni Speaker; Financial Literacy Volunteer

SKILLS & ADDITIONAL

Equity research, three-statement modeling, DCF, earnings analysis, Bloomberg, FactSet, Excel, PowerPoint

INTERESTS

Atlanta food culture, tennis, financial literacy, and public-markets writing