

# CONNOR BUGNI

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## EDUCATION

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### University of Arizona, Eller College of Management

Master of Science in Finance

- **GPA:** 4.0

Tucson, AZ

May 2024

### IAU, College of the Mediterranean

Study Abroad Program

Aix-en-Provence, FR

August 2021 – December 2021

### University of Arizona, Eller College of Management

Bachelor of Science in Business Administration

- **Major:** Finance
- **Minor:** International Business
- **Honors:** Dean's List with Distinction, Dean's Exemplary Award, Arizona Recognition Scholarship

Tucson, AZ

August 2019 – May 2023

## PROFESSIONAL & LEADERSHIP EXPERIENCE

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### Applied Investment Management

University of Arizona

- Strategically manage a \$2.90 million endowment fund on behalf of the University of Arizona Foundation
- Proactively monitor and present key macroeconomic events and their impact on portfolio performance
- Build and utilize various financial models (DCF, DDM, Ratios) to justify buy/sell recommendations
- Oversee and mentor a team of 7 undergraduates responsible for researching Industrials, Energy & Materials sectors
- Leverage components of modern portfolio theory to maximize portfolio information ratio and outperform benchmark

Tucson, AZ

August 2023 – June 2024

### Operations Intern

Northwest Asset Management

- Monitored custodian platforms for restrictions on client investment accounts and executed resolution procedures
- Spearheaded project to expedite the processing of 5,000+ client compliance documents in the CRM system
- Cultivated a positive work environment by engaging with co-workers and contributing to weekly briefs
- Independently registered new client profiles within the appropriate integrated RIA platforms

Mercer Island, WA

June 2023 – October 2023

### Founder, Managing Partner

JCL Capital

- Successfully raised \$1.20 million in capital commitments from a number of accredited investors
- Conducted extensive equity research aimed at identifying mispriced assets, especially in international markets
- Built and regularly rebalanced the firm's investment portfolio for optimal asset allocation and risk management
- Developed performance reports and engaged in strategic discussions with investors to foster transparency and trust

Seattle, WA

May 2019 – March 2023

### Chapter Chairman

Assistance League of Everett

- Improved team processes to maximize efficiency in assembling hygiene kits for over 6,000 children
- Motivated a team of 30+ volunteers by recognizing achievements and setting clear goals for future success
- Managed and executed philanthropic initiatives, raising thousands of dollars via meaningful community engagement

Everett, WA

September 2016 – May 2019

## ADDITIONAL INFORMATION

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**Languages:** Conversational proficiency in French

**Skills:** Advanced Microsoft Excel and PowerPoint, Bloomberg Terminal, Tableau, ArcGIS, Python, Orion, Tamarac

**Certificates:** Passed CFA L1, Passed CAIA L1, CAIA L2 Candidate, Envestnet Institute Wealth Management, Bloomberg Market Concepts, Bloomberg ESG

**Activities:** VP of CFA Club, Bridge Club, Investments Club, Financial Management Association, Graduate Tutor

**Interests:** Equity Research, Portfolio/Asset Management, Alternative Investments, Mergers and Acquisitions, Building Business, International Travel and Culture, Volunteering