

CONNOR BUGNI

(425) 789-8998 | cbugni@arizona.edu | <https://www.cbugni.com/> | <https://www.linkedin.com/in/connor-bugni>

EDUCATION

University of Arizona, Eller College of Management

Master of Science in Finance

- **GPA:** 4.0

Tucson, AZ

Expected 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

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 – Present

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

Sales Associate

The Home Depot

- Collaborated with department teams to organize hundreds of inventory items and streamline task completion daily
- Regularly received formal recognition for exceptional work ethic, attention to customers, and overall performance
- Optimized customer experience and completed in-house responsibilities in collaboration with management
- Maintained working knowledge of departmental capabilities, project timelines, and service offerings

Tucson, AZ

May 2022 – September 2022

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

Languages: Conversational proficiency in French

Skills: Advanced Microsoft Excel and PowerPoint, Bloomberg Terminal, Tableau, GIS, Programming Python

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

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

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