

# CONNOR BUGNI

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## PROFILE SUMMARY

Comprehensive background in business administration with a focus on finance & international business. Two years' experience working closely in project-oriented teams, developing effective communication skills, decision-making abilities, & collaboration practices essential for success in intense team settings. Commitment to work ethic, attention to detail, critical thinking, & discipline has consistently facilitated excellence in multifaceted roles. Proficiencies in Excel, statistical analysis, equity assessment & valuation, & presentation and design. MSF candidate with a deep motivation to work in IB with an emphasis on quantitative analytics, alternative investments, asset management, & market research.

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## EDUCATION

**University of Arizona, Eller College of Management, Tucson, AZ** Expected 05/2024  
Master of Science in Finance (MSF) Candidate

**IAU, College of the Mediterranean, Aix-en-Provence, FR** 08/2021 – 12/2021  
Study Abroad Program

**University of Arizona, Eller College of Management, Tucson, AZ** 08/2019 – 05/2023  
Bachelor of Science in Business Administration | **Major:** Finance | **Minor:** Global Business

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## PROFESSIONAL EXPERIENCE

**Operations Intern** 06/2023 – Present  
Northwest Asset Management, Seattle, WA

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

**Sales Associate** 05/2022 – 09/2022  
The Home Depot, Tucson, AZ

- 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

**Chapter Chairman** 09/2016 – 05/2019  
Assistance League of Everett, Everett, WA

- Improved team processes to maximize efficiency in assembling grooming 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
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## ACADEMIC PROJECTS

**Investment Analysis – Company Stock Valuation** 12/2022  
University of Arizona, Tucson, AZ

- Analyzed five years of financial statement information to identify trends in liquidity, solvency, and profitability
  - Forecasted future financial performance using current and assumed short-term macro-economic conditions
  - Identified idiosyncratic risks and opportunities by reading press releases, articles, and management's discussion
  - Computed a range of equity valuations based on ratios analysis and discount models
  - Presented final conclusions regarding the company and industry projections to professors and peers
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## ADDITIONAL INFORMATION

**Technology Skills:** Microsoft Office Suite, Graphics, Bloomberg Terminal, Tableau, GIS, Learning Python

**Certificates:** Envestnet Institute Wealth Management Training, Bloomberg Market Concepts, STORE Capital Externship

**Languages:** Fluent in English; Conversational proficiency in French

**Interests:** Financial Markets, Equity Research, International Travel, Real Estate, Volunteerism, Bridge Club, CFA Club