

CODY CALL

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EDUCATION

University of California Santa Cruz

Bachelor of Arts in Business Management Economics

Santa Cruz, CA

Class of 2023

- Cumulative GPA: 3.44/4.0
- Restaurant manager (20 – 35 hours/week)
- Relevant Coursework: Managerial Accounting, Financial Accounting, Personal Finance, Intermediate Microeconomics, Intermediate Macroeconomics, Intro Econometrics, Securities Markets, Corporate Finance

WORK EXPERIENCE

Wall Street Oasis

Financial Research Analyst Intern

Saratoga, CA

Jan 2024 – Present

- Wrote five articles on detailed financial, valuation, Excel, accounting, and economic topics such as M&A, DCF
- Over 100+ hours of self-study across financial modeling and valuation courses including Excel modeling, 3-statement modeling, PPT for Finance, DCF modeling, precedent and trading comps, LBO modeling, and M&A modeling

DataAnnotation Tech

Present

- Graded AI responses on five criteria sets to improve chatbots ability
- Researched 50 input prompts to ensure AI chatbots provide accurate answers
- Managed work streams and completed 500 tasks to improve efficiency of operations

Wynn Capital Management

Wealth Management Intern

Santa Cruz, CA

Jan 2023 – Mar 2023

- Conducted research on 80 mutual funds and buffer ETFs, contributing to data-driven investment recommendations
- Prepared outline for ten quarterly client meetings, which entailed returns benchmarking, asset allocation, and risk tolerance
- Ran and analyzed two financial reports daily, extracting key insights to inform investment strategies
- Implemented four streamlined procedures for financial analysis and used financial software to rebalance portfolios

GetVirtual

Project Management Intern

Santa Cruz, CA

June 2022 – Sep 2022

- Conducted interviews with four small business owners, resulting in GetVirtual accepting one of them
- Created a business page using Wix Web design, elevating online visibility by 30%
- Collaborated on website development for local businesses, ensuring tailored solutions and enhanced online presence for three businesses
- Led a three-month marketing campaign, increasing brand recognition and achieving engagement growth by 25%

Burger. Santa Cruz

Shift Lead

Santa Cruz, CA

May 2021 – Aug 2022

- Led 10+ restaurant employees and managed 60+ tables ensuring excellent operational efficiency
- Established a high level of customer service and resolved issues promptly, which drove \$1,000 - \$2,000 revenue/night
- Trained 20+ coworkers to use the POS system and make cocktails

ADDITIONAL INFORMATION

Modeling: Completing Quill Capital Partners' twelve-week Investment Analyst Program covering financial modeling

Computer: Proficient in Excel, PowerPoint, Word, Outlook

Certifications: Securities Industry Essentials (SIE), Real Estate License (pending)

Interests: Basketball (center), Outdoor Activities (hiking, kayaking, beach), Reading(fiction, WSJ)