

Eric Curtis

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EDUCATION

West Virginia University, Morgantown, WV May 2024

Master of Science in Finance

West Virginia University, Morgantown, WV Dec. 2022

Bachelor of Science in Business Administration

Major: **Finance**

Minor: **Accounting**

GPA: 3.7/4.0

TECHNICAL SKILLS & CERTIFICATIONS

Development: Python 3.10, Java, JavaScript, VBA, HTML5, and CSS3

Applications: Microsoft Office (PowerPoint, Excel, Access certified), Bloomberg Market Concept Certificate

Languages: Spanish (Intermediate)

Certifications: CFA Level 1 Candidate – August, 2024

WORK EXPERIENCE

Sales Portfolio Manager, Baltimore, MD May 2021 – Jan. 2024

TForce Worldwide

- Developed and maintained a sales portfolio of 30+ active customers including the TSA and over 500 potential customers in Maryland, Virginia, and West Virginia.
- Performed as an embarkations specialist for our customers including the TSA.
- Provided and participated in numerous white glove services performing as a specialist in the installation of products such as x-ray machines and medical equipment.

Equity Analyst, Morgantown, WV Dec. 2021 – Dec. 2022

Student Managed Investment Fund at WVU

- Oversaw a portfolio valued more than \$500,000 with a team of 12 analysts allocated by industry which has outperformed the S&P 500 since 2019.
- Use of Bloomberg terminal research resources to perform security analysis and recommendations.
- Performed stock valuation using sentiment, fundamental, and technical analysis to make asset allocation decisions.
- Created Python scripts that can perform actions such as web scraping, Monte Carlo simulation, and analytical visualization.

Tutor, Morgantown, WV Dec. 2020 – Dec. 2022

WVU: Finance, Accounting, Economics, Business Core, and Mathematics up to Calc 1

- Coached a wide range of business-related courses by mentoring an average of 3 students weekly with proper learning techniques, learning style, and organizational skills.

Administrative Assistant, Morgantown, WV Dec. 2020 – Dec. 2022

WVU

- Assisted the managers of the Veteran, Military, and Family Program in tasks such as phone receptionist, file management, and making recommendations to incoming veterans using applicable benefits.
- Participated in functions to promote and support veterans at WVU.

MILITARY EXPERIENCE

Noncommissioned Officer in Charge, Iwakuni, Japan Jan. 2014 – Jan. 2019

United States Marine Corps

- Competed and won 9 out of 12 quarterly and two-yearly boards, leading to meritorious promotions in all ranks up to E-5 and earning the title of Noncommissioned Officer of the Year for the Pacific.
- Supervised and developed a quarterly mentorship program for 40+ Marines, focusing on professional growth, conduct, leadership, selflessness, and physical performance.

- Established a skilled avionics maintenance team by training and creating 7 Quality Assurance Collateral Duty Inspectors, resulting in over 50,000 man-hours without any incidents and earning the most awards within our unit.
- Selected and trusted to perform as the acting Staff Noncommissioned Officer in Charge on over 30 detachments resulting in 0 mishaps.
- Obtained a secret clearance and performed as a Special Security Officer (SSO) for the unit resulting in 0 mishaps.
- 350 hours of volunteer service assisting in teaching Japanese students English at the United Nations Educational, Scientific, and Cultural Organization (UNESCO) in Shunan Japan.
- Awarded the Navy Accommodation Medal for superior performance while serving at VMGR-152 and discovering the fix to a communications security issue that prevented satellite communications from providing time-of-day to secured SATCOM radios.

RELEVANT PROJECTS

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| Lead Buy-Side Research Analyst , Morgantown, WV | Aug. 2023 – Present |
| CFA Institute Research Challenge, Pittsburgh, PA | |
- Leading a team of 4 undergraduate students from WVU on creating a buyside research report for Koppers Inc. (KOP) to be presented by mid-February. Mentors are Frank DeGeorge at WVU, former CAO at Mylan Pharmaceuticals and Cale Grove, Managing Director at Incline Equity Partners.
 - Created an LBO and DCF model template from scratch and presented my results on KOP to the undergraduates. Provided in depth guidance and insight on completing their analysis through comments within excel and a weekly meeting as to double check my results and come to a recommendation for KOP.
 - Performed extremely thorough financial statement analysis on KOP over the past 6 years and it's TTM, reclassified the financial statements and normalized the income statement, and analyzed over 100 ratios as to describe the going forward concern and financial flexibility of KOP.
 - Used a quantitative approach that predicted the price of KOP at the 5% significance level.

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| Research , Morgantown, WV | Aug. 2023 – Jan 2024 |
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- Department of Energy Geothermal Collegiate Competition – Economics and Finance Professional with WVU
- Performed as the economics and finance professional on a team consisting of 6 graduate students (3 engineers, 2 geologists, and 1 finance) that proposed and planned the implementation of enhanced geothermal systems based on existing wells and research create by WVU since 2018.
 - Developed a Levelized Cost of Energy (LCOE) model based upon public information and research performed at WVU. Our LCOE fell in line with national averages of implemented geothermal projects.
 - Proposed to WVU that the potential cost savings was significant enough to consider converting/retrofitting the current natural gas system to geothermal due to a lifetime cost savings of 54 to 110 million based upon a worst, base, best case scenario that primarily depends on the initial investment of geothermal, the wells to be drilled, and efficiency of those wells in generating electricity.
 - Procured detailed financial data from WVU on their current natural gas system and energy use, converted enthalpy to KWh, and based our projections on real energy demanded by WVU.

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| Research Mentee , Morgantown, WV | May 2020 – Aug. 2020 |
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- Summer Undergraduate Research Experience at WVU
- Contributed to three research projects in the areas of data cleaning, background research, and data visualization with Drs. Zach Rodriguez and Erika Barker: "From Blizzard Babies to Busty Babes: Porn as a Substitute for Procreation"; "Coping with COVID: The Demand for Pets", and "The Effects of the FARC Peace Plan on Homicides in the Mexican Drug War".
 - The solo recipient of the 2020 Summer Undergraduate Research Experience (SURE) award for WVU College of Business and Economics. Successfully logged 320+ research hours.

LEADERSHIP & ACTIVITIES

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| Treasurer and Vice President , Morgantown, WV | Aug. 2019 – Dec. 2022 |
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- WVU Veterans Club
- Provided general financial oversight, veteran scholarship opportunities, and organized 2 public events for an average of 40+ veterans yearly.