

CONNOR J. KOTULA

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EDUCATION

University of Maryland

Robert H. Smith School of Business

Bachelor of Science, Finance and Accounting (Double Major)

Business, Society and Economy Scholars Program

- Reached final four in annual Center for Value Creation Case Competition, analyzed Apple's corporate social responsibility and sustainability in a framework in relation to the United Nations' Sustainable Development Goals

Wall Street Fellows

- Competitively selected as 1 of 13 students to participate in a training program designed to prepare students for finance careers via a case-based curriculum and extracurricular events

Sophomore Finance Fellows

- Competitively selected to a finance fellows program dedicated to financial education, professional development, and employment opportunity education for sophomore finance students

Harvard Iliad Managerial Assessment

- Participated in a 2.5-hour exercise measuring managerial skills in a mock-business workday
- Received norm-referenced feedback providing benchmark for professional and personal development
- Scores received (comparable Percentile): Decision-Making 90%, Communication 99%, Initiative 96%, Organization 99%

PROFESSIONAL EXPERIENCE

Oceanering International Incorporated

Finance, Business Operations and Development Intern

Hanover, MD

May 2023 – Present

- Completed weekly and daily accounts payable and receivable-based tasks including accounts in excess of \$1 million
- Furthered several efforts towards overall automation of previously hand-coded and completed tasks related to billing and record keeping
- Worked daily with controlled un-classified information pertaining to government operations and business dealings
- Worked closely with management and external customer representatives to close outstanding balances pertaining to completed projects

Edgeworth Economics

Finance Intern

Washington, DC

May 2022 – January 2023

- Completed daily and weekly administrative tasks to help boost productivity and increase billing and revenues for the firm
- Completed a confidential multiweek research and modeling project centered around industry bill rates
- Worked daily in Excel, creating models and historical data-centric conceptualization pieces

Smith Investment Fund

Chief Investment Officer, Executive Board Member

College Park, MD

September 2020 – Present

- Oversee individual investments, portfolio management, and semesterly pitches for the fund; along with training for new associates
- Selected as one of 10 fundamental analysts out of over 120 applicants for a long-only student-managed fundamental equities fund of \$13,000
- Authored research reports analyzing company's competitive advantages, management team, and industry trends

Select Projects:

- SBUX – Performed fundamental due diligence, highlighting beverage innovation and expansions into foreign markets as main thesis points, and built three statement model including public company comparables and forward projections
- DASH – Used previous experience and high-level connections to form a sophisticated understanding of the company's fundamentals and built an in-depth model, complete with a derived cash flow statement
- COHR – Conducted an in depth analysis of a company that had recently been acquired. Created an in-depth model forecasting valuation through a sum-of-parts methodology

Smith Finance Group

Member

College Park, MD

September 2020 – Present

- Meet weekly with the investment banking section to teach and apply pertinent skills used in the industry
- Practice building various financial models including comparative analysis and precedent transactions

LEADERSHIP EXPERIENCE

Christmas Coat Drive

Founder and President

Baltimore, MD

September 2016 – January 2023

- Founded and supervised a club focusing on collecting coats from fellow members of the school community and distributing to select homeless shelters in Baltimore on Christmas Morning in coordination with the Linda's Legacy Foundation
- Led collection and distribution of nearly 3,500 articles of clothing over four years, helping homeless and less-fortunate in the Baltimore Area

ACTIVITIES AND ADDITIONAL INFORMATION

Honors & Skills: Website Design, Microsoft Excel and PowerPoint, Dean's List

Activities and Interests: Ravens Fan, Wakeboarding, Poker, Skiing

Anticipated Upcoming Career Activities: Teaching Assistant for the Advanced Portfolio Management and Equity Analysis Class at UMD