

JAKE R. BLUM

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EDUCATION

University of Maryland

Robert H. Smith School of Business

Bachelor of Science, Finance

College Park, MD

GPA: 3.94

Expected: May 2024

Special Programs

- **Wall Street Fellows** – Selected as 1 of 16 students to participate in case-based training for finance careers
- **Sophomore Finance Fellows** – Selected as 1 of 27 students to participate in a finance training program

PROFESSIONAL EXPERIENCE

Pandi Capital

Incoming Investment Analyst

Kansas City, MO

July 2024

StepStone Group

Venture Capital Summer Analyst

Baltimore, MD

June 2023 – August 2023

- Conducted direct and fund investment due diligence to influence discretionary investments and advisory resources
- Assisted colleagues during calls with management teams and provided meeting summaries to senior leadership
- Pitched a direct investment within StepStone's early-stage portfolio to 70 team members and partners, highlighting the company's financials, competitive landscape, management team, and potential exit opportunities

University System of Maryland Foundation

Investment Research Analyst Intern

Washington, DC

January 2023 – May 2023

- Selected as 1 of 4 analysts for an endowment fund of \$2bn AUM that supports 25 Maryland institutions
- Supported fund investments across public markets, private markets, and alternative assets to achieve fund goals

Chapin Davis

Investment Management Intern

Baltimore, MD

June 2022 – August 2022

- Conducted fundamental analysis and industry research to support investment theses and propose portfolio changes
- Developed investment reports to evaluate companies' financial health, growth potential, valuation, and risks
- Created and maintained documents that highlighted portfolio holdings and performance to present to clients

LEADERSHIP EXPERIENCE

Lemma Senbet Fund

Consumer Discretionary Analyst

College Park, MD

May 2023 – Present

- Selected as 1 of 12 students to manage a \$2.5mm university investment fund, overseeing consumer discretionary investments
- Identify investment opportunities to optimize performance through fundamental analysis and financial modeling

Select Project:

- *MGM*: Pitched a BUY, highlighting superior branding, strategic partnerships, omnichannel leadership, and expansion plans

Smith Investment Fund

CEO & President

College Park, MD

October 2021 – Present

- Manage a long-only equity fund of \$15,000 AUM, overseeing portfolio management, training, and recruitment
- Utilize fundamental analysis and financial modeling to prepare research reports and evaluate potential investments

Select Project:

- *VRTX*: Pitched a BUY, highlighting market dominance, financial strength, and innovation within their growing pipeline

Army ROTC

Security Clearance: Secret

College Park, MD

June 2022 – Present

Battalion S1: Personnel Administration

May 2023 – Present

- Provide personnel and administrative support to 120 Cadets, including accountability, evaluation reports, and awards
- Oversee the planning of training events and ensure continuous personnel readiness for all commissioning requirements

ADDITIONAL INFORMATION

Activities: Smith Finance Group, Fidos for Freedom, ROTC Color Guard, ROTC Run Team, Intramural Soccer

Interests: Manchester City, UMD Sports, National Parks, Traveling (Italy, England, France), Weightlifting, Running