

Carissa L. Beyer

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EDUCATION

Michigan Technological University (2020-Present)

Finance Undergraduate

Dean's List Fall 2020 and Spring 2021

Beta Gamma Sigma Chapter Member

Student-Athlete, Women's Volleyball

Expected Graduation: December 2022

Economics Club Secretary (2022-Present)

University of Dayton (2018-2020)

Finance and Economics Undergraduate

Dean's List Fall 2018 and Spring 2019

A-10 Commissioner's Honor Roll 2018-19

Student-Athlete, Women's Volleyball

WORK EXPERIENCE

Robert W. Baird & Co. Inc. (June 2021-August 2021)

Private Wealth Management Intern

- Planned and setup client events, worked with financial plan data entry, reviewing recommended managers performances, researching reports, and working on front facing analysis with client interactions.
- Helped my team market a new software to clients making access to financial statements simple and quick.
- Designed account opening form for prospective or new clients, incorporated them into a CRM database.
- Reached out to all clients that needed to update or add beneficiaries to their accounts. ● Processed money movements from outside firms into Baird.

Paradise Island Restaurant (February 2016-August 2018, and May 2020-August 2020)

Employee

- Worked with all customers, trained new employees, handled customer service issues, trained on how to count money for the establishment, and learned how to effectively improve work ethic.

LEADERSHIP

Michigan Technological University: Women's Volleyball Team (2020-Present)

Student-Athlete

- Earned the team sportsmanship award for the 2020-2021 season.
- Contributed to being co-champion of the Spring 2021 GLIAC's regular season championship, and champions of the Fall 2021 GLIAC regular season championship. ● 2021 All-GLIAC Second Team Honors.

University Of Dayton: Women's Volleyball Team (2018-2020)

Student-Athlete

- Contributed to winning two Atlantic 10 Conference Championships.
- Leveraged communication and leadership skills to enhance team collaboration in competitive, high pressure settings.

Applied Portfolio Management Program (APMP): Michigan Technological University (2021-Present)

Team Member

- Worked on a team to manage \$2.01 million of Michigan Tech's endowment fund.
- Created a new investment management firm by creating and presenting an Investment Policy Statement to the Michigan Technological University APMP Board, along with quarterly presentation updates.

- Analyzed financial statements and macroeconomic variables to create buy and sell decisions for our portfolio.

