

# Franke Tappan

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## Qualifications

- Analyzed annual expenses to create budget for a Sierra Club event.
- Bloomberg Essentials certification.
- Bloomberg Aptitude Test 2015 78 percentile.
- Strong sales skills through building interest in the TEACH organization, the Grand Canyon Watershed, and through competitive sales promotions.
- Proficient in Microsoft Excel, Word, PowerPoint and Access.

## Formal Education

### **Northern Arizona University**

BSBA Finance and Marketing Major, Certificate in Investments

Graduate May 2016

GPA – 3.87

## Experience

July 2015 -  
Present

### **CFA Institute**

*Global Investment Research Challenge*

- Research and analyze a publicly traded company.
- Create a sell side report with a buy, sell, or hold recommendation. The report will consist of a business description, industry overview and competitive positioning, investment summary, valuation, financial analysis, and investment risks.

Aug. 2015 –  
Present

### **Northern Arizona University**

*Supplemental Instructor Leader FIN 340*

- Facilitate study sessions and assist students in understanding concepts from class.
- Plan and lead activities in my sessions to support all learning types.
- Encourage students to develop positive study strategies.

June 2015 –  
July 2015

### **Silicon Valley Bank**

*IT Operations Intern*

- Promoted the IT department within the bank and solved communication problems within IT.
- Updated the End User Services home page.
- Sent emails out company-wide to inform employees of changes occurring in IT.
- Responded to employee surveys on the IT ticket system to determine how it can be improved.

Feb. 2014 –  
Sept. 2015

### **TEACH.org**

*Campus Organizer*

- Brainstorm creative approaches to encourage NAU students to become the next generation of educators.
- Organize and execute presentations to campus clubs and organizations.
- Discuss scholarship opportunities, state certifications, mentorship program and opportunities with STEM students, clubs and organizations on campus.

Nov. 2014 –  
March 2015

### **Sierra Club**

*Volunteer*

- Created a budget for Colorado River Days based on analyzing the previous year's expenses.
- Contacted local businesses to share our mission and to ask for support for protecting the Grand Canyon Watershed.

## Professional Organizations

Spring 2015

**Investment Club**

Spring 2012

**Phi Theta Kappa Honors Society**

# Allison Tappan

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## Qualifications:

- Organize and execute presentations to campus clubs and organizations.
- Store opening and closing and balancing of cash drawer.
- Trained new hires and future management team members in store standards and responsibilities.
- Strong sales skills through building interest in the TEACH organization, the Grand Canyon Watershed, and through competitive sales promotions.
- MS Excel, Word, PowerPoint and Access.

## Formal Education:

### **NORTHERN ARIZONA UNIVERSITY**

Marketing and Finance Major

Anticipated May 2026

GPA – 4.0

### **NAPA VALLEY COLLEGE**

Associates in Business Administration

December 2022

GPA – 3.8

## Experience:

Fall 2020 – **Sierra Club**

Present *Volunteer*

- Contact local businesses to share our mission and to ask for support for protecting the Grand Canyon Watershed.
- Responsible for updating financial documents including: xxxxxxxxxxxx,xxxxxx, and xxxxx

Spring 2019 – **TEACH Organization**

Present *Campus Organizer*

- Brainstorm creative approaches to inform NAU students to become the next generation of educators.
- Organize and direct events to engage with students, presenting information sessions, and facilitate Q & A sessions.
- Discuss scholarship opportunities, state certifications, mentorship program and opportunities with STEM students, clubs and organizations on campus.

Fall 2019 – **Jamba Juice**

2014 *Team Member*

- “Training mentor” for new employees responsible for training 10+ employees; including future management.
- Responsible for opening/closing store, counting and balancing bank, and Manager on Duty role in absence of management team.
- Commended for my performance through customer survey comments in “JamTrak”.
- Offered the position of “shift lead” and collaborated with a manager in creating and implementing a winter cleaning schedule.

## **Professional Organizations:**

Spring 2014 **Alpha Kappa Psi**

- Professional Business Fraternity where I serve on the Service Committee, the Social Committee, and the Alumni Committee.
- Participated in Relay for Life, Pie-A-Brother for fundraising and recruiting new members at our booth.

Spring 2012 **Phi Theta Kappa Honors Society**

# Franke Paige

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## Qualification

- Bloomberg certified: Bloomberg terminal essentials core, equity, and fixed income certification
- Basic Knowledge of SAS
- Financial Analyst & Presenter of Student Managed Investment Fund, responsibilities include communicating with and presenting to our client, the NAU Foundation.
- Treasurer of Chinese Culture Club and Vice Present of Beta Alpha Psi
- Mandarin (Native), English (fluent)
- Leadership: Responsible for assisting international students in transiting to Universities in Shandong University (China) and Northern Arizona University ( The United States)

## Education

<b>Northern Arizona University - Finance &amp; Actuarial Science</b> Flagstaff, Arizona, The United States of America Dean's list	2018 Cumulative GPA 3.95 2015-2017
<b>University of California, Irvine - Finance</b> Irvine, California, The United States of America Exchange student for 1 semester	2014
<b>Shandong University (Top 15 in China) - Finance</b> Weihai, Shandong, The People's Republic of China	2018

## Work Experience

<b>Financial Analyst &amp; Presenter</b> Student Managed Investment Fund	03/2017 – 05/2017 Flagstaff, Arizona, USA
<ul style="list-style-type: none"><li>• Presented original valuation analysis and investment recommendation for Novo Nordisk Corporation to portfolio advisors and managers. Resulted in the purchase of \$58,000 worth of shares, which now makes 5% of the ESG portfolio.</li><li>• Conducts research and qualitative analysis to capitalize on undervalued securities for a portfolio valued in excess of \$3 million.</li><li>• Funds reporting committee team member, responsibilities include communicating with and presenting to our client, the NAU Foundation.</li></ul>	
<b>Financial Reporting Assistant(Externship)</b> Equity Methods	05/2017 – 05/2017 Scottsdale, Arizona, USA
<ul style="list-style-type: none"><li>• Solved some central problems in forecasting and budgeting for stock-based compensation expense by using SAS.</li><li>• Learned programming by using SAS</li><li>• Explaining and presented case results to experienced Equity Methods employees.</li><li>• Interact and network with senior professionals in a nationally recognized consulting practice.</li></ul>	
<b>Math &amp; Chinese Teacher Assistant</b> Northern Arizona University	01/2016 – 05/2016 Flagstaff, Arizona, USA
<ul style="list-style-type: none"><li>• MAT 119 Finite Mathematics</li><li>• Chinese 102 Mandarin</li></ul>	
<b>Equity Analyst (Internship)</b> Shenwan Hongyuan Group Co Ltd	01/2014 – 04/2014 Shanghai, China
<ul style="list-style-type: none"><li>• Largest and oldest equity company in China</li><li>• Under energy Stock Department, Suggested energy stock for customers and writing reports.</li></ul>	

## Leadership, Honors & Organizations

- Northern Arizona University Dual- degree scholarship for International Students, Shandong University Presidential Scholarship, Phi Kappa Phi Honors Society Undergraduate Scholarship, Knutson/Umland Scholarship from The W. A. Franke College of Business
- APICS West Coast Supply Chain Management Case
- Phi Kappa Phi Honors Society (member)
- President of the Shandong University Model United Nation Conference