

CANDIDATE PROFILE

Finance discipline. Operational perspective.

U.S. Army veteran and finance professional connecting financial statements to the business beneath them.

EXPERIENCE

Finance assistant

Accrual accounting, reconciliations, reporting, board materials, and audit trails.

Data center operations

5+ years supporting mission-critical infrastructure, controls, records, and customer service.

U.S. Army

Logistics and financial management supporting \$10M+ in operational expenditures.

RESEARCH APPROACH

Fundamentals / valuation / industry structure / institutional behavior / technical structure / explicit risk rules

EDUCATION

B.S. Finance - San Diego State University, expected 2027

A.S. Business Administration - San Diego Miramar College, 2024

TOOLS & DEVELOPMENT

Financial modeling, Excel, QuickBooks Online, Bloomberg Market Concepts, tested portfolio metrics, Python document automation

INVESTMENT PHILOSOPHY

A thesis is a hypothesis
to update as evidence
changes.

SELECTED PROOF OF WORK

Featured company research / transparent financial models / documented portfolio methodology / mistake-journal process / print-friendly recruiter portal

Explore the full profile and contact Shy at luna1research.com/recruiter