

PROFESSIONAL SUMMARY

Finance professional and U.S. Army veteran with experience in fundamental investment research, financial analysis, nonprofit finance, and mission-critical operations. Applies analytical rigor and an operational perspective to company fundamentals, valuation, industry structure, capital allocation, and risk.

PROFESSIONAL EXPERIENCE

Coronado Historical Association Executive & Finance Assistant

May 2026 - Present

Support accrual-basis accounting, accounts payable, bank and credit-card reconciliations, cash-flow planning, board reporting, and audit-ready nonprofit finance records.

LightEdge Solutions Data Center Operations Technician / NOC Technician

Nov 2020 - Present

Diagnose network, server, storage, and security issues; support VMware environments, infrastructure provisioning, connectivity testing, and change-management procedures.

United States Army Supply Specialist & Financial Management Technician

Nov 2015 - May 2019

Coordinated aviation and ground logistics; supported budgets, reconciliations, reporting, and accountability for more than \$10 million in operational expenditures.

Wilgus Associates Junior Reconciliation Accountant

Jun 2014 - Jul 2015

Maintained ledgers, performed bank reconciliations, researched variances, supported month-end close, and helped reduce reconciliation time by 50% through automation.

EDUCATION

San Diego State University, Fowler College of Business - B.S. Finance, expected 2027

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

RESEARCH & LEADERSHIP

Aztec Investment Fund (AIF) - Fundamental equity research, thesis development, and AI infrastructure value-chain analysis informed by hands-on data center experience.

CERTIFICATIONS & SKILLS

QuickBooks Online Level 1; Bloomberg Market Concepts.

Financial statement analysis, budgeting and forecasting, account reconciliation, financial modeling, valuation, reporting, portfolio analysis, Excel, and Python workflows.