

Noah Oakes

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EDUCATION

Kansas State University

Cumulative GPA: 3.44 | Major GPA: 3.50

Finance, Personal Financial Planning (3 courses left to complete CFP education), Investment Management | May 2025

CERTIFICATIONS & SKILLS

- **Certifications & Skills:** Securities Industry Essentials (SIE), Series 66, Series 65, Accredited Asset Management Specialist™ (AAMST™), Kansas Insurance Certificate, Holisitiplan, Morningstar, Salesforce

PROFESSIONAL

E-Valuator T.E.A.M Challenge

Manhattan, KS

Challenge Portfolio Manager

Sep 2024 – Dec 2024

- Allocated \$100,000 in a mock portfolio for the period of the challenge
- Placed 6th out of 394 participants from 50 different universities across the nation
- Challenge points were awarded on three factors including performance (60%), standard deviation (25%), and expense ratio (15%)

Fidelity Investments

Raleigh, NC

Brokerage Client Relations Intern

Jun 2024 – Aug 2024

- Assisted 5-10 clients per hour regarding investment account services ensuring high levels of client satisfaction, while performing above the company's national performance metrics
- Collaborated with 4 other interns, included conducting quantitative and qualitative research towards delivering a solution to increase client experience index, presented final capstone project to 6 senior site leaders and other associates
- Shadowed financial consultants and other members of a wealth management team, meetings included preparation for client planning appointments

Stadium Chair Co.

Lenexa, KS

Office Intern/Assembly Crew Member

May 2022 – Aug 2023

- Assisted with sales analysis projects with the goal of finding sales opportunities
- Paced work to meet daily and weekly production goals to ensure orders were shipped to client satisfaction

Wingstop

Olathe, KS

Crew Shift Lead

Nov 2020 – Aug 2021

- Reported daily sales data, accurately reconciled cash drawers, and prepared daily shift reports to be communicated with management
- Delegated tasks, communicated expectations, and directed 5-8 employees daily to improve performance

LEADERSHIP & ACTIVITIES

FinServ Foundation Fellowship Program

Manhattan, KS

Member

Aug 2024 – Present

- Selective program dedicated to empowering and supporting the next generation of financial professionals by engaging in a mentorship program, webinars, conferences, and professional coaching

Invest-A-Cats (Student Investment Fund)

Manhattan, KS

Treasurer

Aug 2023 – Present

- Hands on experience with portfolio management through student managed endowment of \$75,000
- Exposure to morningstar, portfolio diversification, and mutual fund analysis
- Assist in making key decisions regarding student portfolio

Student Finance Association

Manhattan, KS

Member

Aug 2023 – Present

- Student ran organization exposing members to firms in the industry with the goal of improving financial literacy
- Cultivate advanced financial, networking, and professional skills that are essential to excel in the industry

Investment Club

Manhattan, KS

Member

Aug 2021 – Present

- Gain insight into the investment world with on-campus meetings led by industry professionals
- Discuss investment opportunities, market trends, and concepts to increase investment comprehension

Delta Sigma Phi

Manhattan, KS

Member/House Manager

Aug 2021 – Present

- Ensure house cleanliness is maintained on a daily basis as well as communicating maintenance needs with other house managers to ensure our alumni corporation board is aware
- Participate in 2-3 philanthropic events per year with all proceeds going to charity