

R. Jesse Worek

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EDUCATION

Temple University, Fox School of Business

Philadelphia, PA

Bachelor of Business Administration

May 2015

MAJORS: Finance and Management Information Systems

GPA: 3.76

Honors: Dean's List, Fall 2011- Fall 2013, Fall 2014

Study Abroad: Temple University Rome, Summer 2013

Relevant Coursework: Financial Statement Analysis, Intermediate Corporate Finance, Investments, Data Analytics, Data-Centric Application Development, Digital Design and Innovation

CFA Charter Level I Candidate: December 2014

EXPERIENCE

William C Dunkelberg Owl Fund

Philadelphia, PA

Chief Investment Officer

August 2014 - Present

- Collaborate with the Director of Portfolio Management to calculate and analyze fund performance in order to determine sector weightings and identify underperforming holdings.
- Conduct industry and company research to assist analysts in investment thesis, valuation, and initiating coverage development.
- Create and present investment committee materials including a semi-annual newsletter and an annual report comprising of fund holdings, performance, and events.

Lead Analyst of Technology, Associate Analyst of Healthcare

August 2013 – May 2014

- Prepared stock pitches and initiating coverage reports by conducting market research, financial analysis, and relative valuation on companies in assigned sector to capitalize on undervalued or mispriced securities.
- Used Bloomberg, Capital IQ, Thomson One, and other industry research tools to perform equity research and to search for undervalued companies.
- Created forecasts, discounted cash flow models, linear regression simulations, and relative valuation tables using Excel to support research in initiating coverage reports and to generate 52 week price targets.

Bloomberg L.P.

Skillman, NJ

Global Data Intern, Energy/Commodities

May 2014 - August 2014

- Assisted in managing fundamental energy and commodities data, specifically North American electricity markets.
- Researched 160 US oil refineries to determine relationships between refineries and crude oil pipelines, petroleum product pipelines, and chemical pipelines.
- Enhanced the data of over 9,000 North American power plants by using VBA macros and SQL to calculate river, drought monitor, and weather station distances.

William Penn Foundation

Philadelphia, PA

Investment Operations Intern

December 2013 - May 2014

- Managed due diligence materials from external fund managers through an Access database containing over 250 managers.
- Worked with a team of seven colleagues to manage assets invested in equity, fixed income, real estate, real assets, private equity, and hedge funds.
- Prepared weekly asset allocation and world economic data reports via Bloomberg API.

SKILLS & ACTIVITIES

Technical Skills: Bloomberg Terminal, Bloomberg API, S&P Capital IQ, SAS Enterprise Miner, SQL, PHP, VBA, Python (currently learning), Microsoft Office

Activities: Financial Management Association: Executive Vice President of Corporate Relations- Fall 2013 and Spring 2014, Fox School of Business Mentorship Program: Mentor Fall 2012 to Present