

Josh Smiley

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EDUCATION

The University of Iowa Tippie College of Business | Iowa City, Iowa

Anticipated May 2026

- BBA Finance and Corporate Accounting
- Minor in Sports Recreation and Management
- GPA: Tippie College of Business: 4.09/4.0
- Dean's list: Fall 2023 - Spring 2025
- President's list: Fall 2023 - Spring 2025

WORK EXPERIENCE

Henry Fund Equity Research Analyst | Iowa City, Iowa

December 2025 – Present

- The Henry Fund (henryfund.org) is a \$29M endowed equity portfolio managed by a highly selective group of students at the Tippie College of Business, one of the largest student-managed funds in the world
- Collaborated with research team on portfolio management decisions for a concentrated portfolio of 25-30 securities benchmarked against the S&P 500
- Conducted comprehensive equity research, built financial models using DCF, economic profit, relative valuation, and sensitivity analysis for portfolio holdings

Krause Fund Equity Research Analyst | Iowa City, Iowa

August 2025 – December 2025

- The Krause Fund (tippie.uiowa.edu/krause) is a \$900K endowed equity portfolio managed by undergraduate finance students at the Tippie College of Business
- Conducted industry and company research in the industrials Sector and built robust financial models using discounted cash flow (DCF), economic profit, relative valuation, and dividend discount analysis
- Present Buy/Sell recommendations to the Fund's advisory board and work with the Krause Fund research team to determine final selections and portfolio weightings

Retail Sales Associate, Dick's Sporting Goods | Geneva, Illinois

May 2022 – August 2025

- Consistently contributed to daily sales exceeding \$50,000 by providing personalized product guidance
- Advised customers on technical and performance features across multiple sports and outdoor categories
- Strengthened teamwork and communication skills through collaboration with colleagues to meet store goals and ensure customer satisfaction

TEACHING AND LEADING EXPERIENCE

Teaching Assistant | Introduction to Financial Management

August 2025 - Present

University of Iowa Tippie College of Business | Iowa City, Iowa

- Support large lecture of 200+ students by assisting groups with in-class finance problems
- Review solution materials and common errors in advance to guide students through logic-based learning
- Selected for role due to strong past performance and ability to explain financial concepts clearly

Teaching Assistant | Physical Education

August 2021 - May 2023

St. Charles North High School | St. Charles, Illinois

- Supported classroom instruction and student engagement
- Planned outline for classes, including goals and instructions
- Learned importance of leadership and how to teach a group of individuals

ACTIVITIES

Member | University of Iowa Tippie Business Honor Society

January 2024 - Present

- Part of top 10% GPA within the Tippie College of Business
- Participate in community involvement work with other members

Member | University of Iowa HawkTrade

August 2023 - Present

- Analyze market trends, stock performance, and macroeconomic indicators in weekly discussions
- Develop understanding of portfolio management, risk assessment, and financial decision-making

CERTIFICATES

Bloomberg Market Concepts (BMC) & ESG Certificate

December 2025

- Training in Bloomberg Terminal use, financial markets, macroeconomics, and ESG investing

University Associate Certified Insurance Counselor, CIC Personal Lines

January 2025

- Demonstrated expertise in personal insurance coverages, including auto, home, and personal liability, through comprehensive coursework and rigorous examination

CFA Institute Investment Foundations Certificate

November 2024

- Gained foundational knowledge in investment management, financial instruments, and portfolio analysis

Wall Street Prep: Financial Valuation Modeling

November 2024

- Applied financial modeling techniques to analyze company performance and support investment decision-making