

Chance B. Bootstaylor

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EDUCATION

Tufts University

Bachelor of Arts in Economics

Minor in Finance

GPA: 3.9/4.0; **ACT:** 34

Honors/Awards: Dean's List (2 Semesters)

Relevant Coursework: Calculus I, International Finance, Intro to Finance, Intro to Psychology, Intermediate Macroeconomic Theory, Principles of Economics, Intro to Ethics

Relevant Programs: Goldman Sachs Summer Insight Series, Morgan Stanley 2021 Freshman Enhancement Program, Bank of America Diversity & Inclusion Forum, 2021 Citi Freshman Discovery Program, KKR Diversity Insights Program, UBS Tomorrow's Leaders Program, HSBC Spring Insight Program, Fidelity Investments Diversity Insight Program, PIMCO Prep

Medford, MA

Expected May 2024

EXPERIENCE

The James Irvine Foundation (3.7b AUM)

Investment Fellow, Foundation Investment Team

San Francisco, CA

June 2021 – August 2021

- Attended a 3-day seminar with ten fellow interns and portfolio managers from various institutions discussing asset classes, investment strategies, and manager selection
- Participated in multiple manager meetings to aid in the due diligence process and gauge the managers' portfolio compatibility
- Researched the application of MSCI ESG ratings to sectors and public equities and analyzed the methodology behind these ratings
- Presented sector and company ESG analysis in a final 30-slide PowerPoint to fellows, portfolio managers, and professionals at participating institutions ultimately revealing a correlation between ESG risk and changes in shareholder value

Callodine Group (700m AUM)

Analyst, Callodine Capital

Boston, MA

February 2021 – June 2021

- Participated in weekly analyst meetings and assisted analysts through the completion of assigned projects and ad-hoc analyses
- Conducted research using Bloomberg, S&P Capital IQ, and sell-side analyst reports on COVID-19's effects on 85 portfolio companies held by top BDC positions and identified potential long/short opportunities in the Consumer Retail sector
- Created and presented a PowerPoint to the firm with in-depth analysis of the fund's largest BDC holding ultimately revealing primary portfolio risk concentration within 9 loans, potential market forward loss mispricing, and a final risk-reward of 28%

Tufts University

Research Assistant, Department of Economics

Medford, MA

August 2020 – January 2021

- Analyzed the impact of the 2018 Chinese Peer to Peer Lending Crisis under a Tufts economics professor reviewed research papers on the effect of expanding health insurance availability in developing countries to assist a literature review

LEADERSHIP EXPERIENCE & PROFESSIONAL DEVELOPMENT

BLK Capital Management

Equity Research Analyst

Medford, MA

February 2021 – Present

- Work with analysts from around the nation to perform equity research and lead Consumer Retail coverage team in developing industry reports that highlight prevailing trends and investment opportunities

SEO Career

SEO Edge Participant

New York, NY

January 2021 – Present

- Receive coaching and online assessments to achieve targeted investment banking interview, technical, and professional development goals

Tufts Financial Group

Chief Operating Officer

Medford, MA

September 2020 – Present

- Work closely with members of the board to ensure smooth operations of a variety of programs and events including alumni panels and weekly finance training programs
- Participated in Sectors program working with peers to conduct a DCF valuation of Walmart and presented a stock pitch to current Tufts seniors for feedback and guidance

OTHER ACTIVITIES & INTERESTS

Activities: Jumbos for the Advancement of Minorities (JAM), Tufts Economics Society, Black Student Union

Technical Skills: Microsoft Excel, Bloomberg Terminal, Bloomberg Query Language, S&P Capital IQ

Interests: Cars (Formula 1; exotics), films (Spielberg; Tarantino), and space exploration (Space Race; Space Shuttle program)