Ian Conrad Engweiler

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Education

Western Michigan University, Haworth College of Business, Kalamazoo, Michigan

Bachelor Of Business Administration 2020 – April 27, 2024

- Major: Personal Financial Planning.
- Eligible to take the Certified Financial Planner (CFP) exam post-graduation.
- GPA: 3.82

Professional Experience

Mercer Advisors, Remote, Financial Planning Group Intern Jan. 17 - Dec. 31, 2023

- Developed organizational skills and the ability to work as a team remotely.
- Improved proficiency with eMoney and other fintech systems by plan transferring to Mercer's standards.
- Analyzed existing client information and made decisions that influenced the client's plan.
- Used Holistiplan to analyze client tax information and applied findings for Roth-conversion evaluation.
- Checked the listed beneficiaries of over 700+ clients to ensure the success of their estate plans.

Penter's Solar Energy, Assistant Job Supervisor and Solar Installer 2021 – Nov. 2022

- Delegated tasks among the team while collaborating with employee autonomy.
- Ensured daily goals were completed during times of low morale.
- Created novel solutions to many problems on site to maximize efficiency.
- Managed safety protocol when the weather conditions were rough, or an employee was injured.

Relevant Coursework

Student Managed Investment Fund (Grade: A) Fall Semester 2023

- Managed a portfolio of $2.6 million of WMU Foundation money with other students.
- Modeled each stock using Excell and Bloomberg to determine the Discounted Cash Flow value.
- Presented the value of each stock to the class to support my thesis to buy or sell the stock.
- Collaborated with the other students to ensure that the stocks we bought and sold improved returns.

Financial Coaching (Grade: A) Spring Semester 2023

- Learned about many aspects of behavioral finance, including cognitive biases and client onboarding.
- Exercised my data-gathering skills by having two mock client meetings with the professor.
- Created a mock client plan by analyzing the sample info. provided and presented it to the professor.

Honors and Activities

Recipient, Liehr Family Scholarship for Personal Financial Planning Spring 2023

Dean's List Recognition Recipient 2020, '21, '22, '23

eMoney Fundamentals Certification 2022

VP of Marketing, Financial Planning Association at Western Michigan University 2020 – Present

Skills & Proficiencies

Business: Data Analysis, Microsoft Office Suite: Excel & more, Leadership, Data Entry, Adaptability, Teamwork, Eager to Learn, Time Management, Independence, Critical Thinking, Research, Communication, Problem Solving.

Finance: eMoney, Holistiplan, RightCapital, Salesforce, Financial Literacy, Budgeting & Forecasting, Investment Strategies, Financial Coaching, Portfolio Management, Stock Picking, Behavioral Finance, Financial Planning.