

# Aaron Vessels

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## EDUCATION

### Virginia Polytechnic Institute and State University (Virginia Tech)

B.S. in Finance

Overall GPA: 3.56/4.00

Blacksburg Virginia

May 2026

### BASIS (Bond And Securities Investing by Students)

Blacksburg Virginia

*Student-run team managing a \$5mm fixed income portfolio within Virginia Tech Foundation's endowment using Bloomberg and other tools for research, security selection, trading, analytics, and administration*

*Analyst: I/U Sector*

August 2024 - Present

- Contribute to quantitative and qualitative analysis of trends on existing and potential investments using Bloomberg Terminals and Microsoft Excel.
- Enhance fundamental financial analysis, Bloomberg, portfolio development, and portfolio monitoring skills.

## WORK EXPERIENCE

### IPP Financial Advisors - Expat Advisory Group

Singapore, Singapore

*Wealth Management Intern*

May 2025 - Present

- Conducted Ad Hoc investment and currency research.
- Advised multi-currency portfolios.
- Assisted in preparing reports and presentations for client meetings
- Accompanied consultants in client meetings

### RBC Wealth Management

Columbus Ohio

*Wealth Management Intern*

May 2024 – August 2024

- Conducted market research to support investment advising for three advisors.
- Prepared portfolio equity reports in Excel with data populated from FactSet and created presentations for advisors on more than 100 clients.
- Part of a team managing \$1.1 Billion.
- Accompanied financial advisors in client advisory meetings.

### UBS Wealth Management

Columbus Ohio

*Wealth Management Intern*

May 2023 – August 2023

- Studied for and passed the SIE.
- Assisted in preparing reports and presentations for client meetings.
- Accompanied financial advisors in client meetings.

## ACTIVITIES AND HONORS

### FINRA Securities Industry Essentials (SIE)

July 2023

- Studied for and passed the SIE while at UBS Wealth management

### Chartered Alternative Investment Association (CAIA) Association

June 2025 - Present

- Scheduled to sit for Chartered Alternative Investment Analyst (CAIA) level one exam in September 2025.
- Plan to pass CAIA level two in March 2026.

### Bloomberg Finance Fundamentals and Market Concepts Certificates

October 2023

- Obtained Bloomberg market and finance certificates

## OTHER

**Technical Skills:** Microsoft Excel (Macros and VBA), Bloomberg Terminal, PowerPoint, Financial Analytics

**References:** Personal fitness, chess, reading, economics

## References

- Ian J. Pryor, Managing Partner, IPP Financial Advisors, +65 9320 9737, ianpryor@ippfa.com
- William E. James, RBC Wealth Management, +1 (304) 546-7050, william.james@rbc.com
- Patrick Ford, RBC Wealth Management, +1 (614) 681-5768, patrick.m.ford@rbc.com
- Anastasia Duble, RBC Wealth Management, +1 (585) 880-0853, anastasia.duble@rbc.com