

Max Harrison Simmons

EDUCATION

University of Iowa | Henry B. Tippie College Business **Anticipated: May 2026**
B.B.A. Finance; B.B.A. Business Analytics and Information Systems GPA: 3.81/4

- **Iowa Deans List:** Earned 3.50+ GPA with at least 12 semester hours

INTERNSHIP EXPERIENCE

Foster Group | *Wealth Management Intern* | West Des Moines, Iowa May 2024 – Present

- Assist the advisory team in building financial plans for clients
- Evaluate client's investment portfolios and offer insight guided by upper-level management
- Gain knowledge in understanding the process of the client journey

ACTIVITIES & SERVICE

Phi Kappa Psi Fraternity | *President* | *Alumni Relations Chair* August 2022 - Present

- Assisted in building a \$800k budget based on historical cash flows to fund current year rent and utilities
- Collected over \$50k in unpaid dues to get the chapter out of debt to the national fraternity
- Established and executed organizational objectives within our executive team
- Facilitates activities and the organization of a 190-person chapter

Applied Wealth Management Marberry Fund | *Manager* January 2025 - Present

- Constructing and managing portfolios for a simulated client, offering strategic investment recommendations and financial planning
- Applied financial concepts and asset allocation strategies to select investments for the Marberry fund that helps fund Tippie scholarships

Tippie College of Business | *Financial Management Teaching Assistant* August 2024 – December 2024

- Assist over 350 students in learning introductory financial concepts

Dance Marathon | *Member* August 2022 - Present

- Raised over \$500 for cancer patients at the University of Iowa Stead Family Children's Hospital

Boys and Girls Club | *Volunteer* | Iowa City, Iowa August 2023 - Present

- Support youth development by engaging with children in educational, recreational, and creative activities

WORK EXPERIENCE

The Airliner | *Bartender* | Iowa City, Iowa December 2024 - Present

- Optimized inventory management by tracking sales trends, reducing waste, and maintaining cost efficiency

Earl May | *Landscaper* | Waukee, Iowa May 2023 - August 2023

- Interacted with customers to design stunning landscapes through design principles and client preferences

SKILLS

Languages: Python, SQL, HTML

Software: Bloomberg, Excel, Power BI, Salesforce, Oracle Workspace, Microsoft Office

Course Highlights: Applied Wealth Management, Financial Accounting, Managerial Accounting, Financial Management, Investment Management, Corporate Finance, Business Communication and Protocol

INTERESTS

NCAA Basketball | Golf | Health and Fitness | Reading