

WINSTON A. KOTZAN

wak@wakproductions.com • 219-741-3210
8822 Parkway Drive • Highland, IN 46322

EDUCATION

Indiana University Kelley School of Business - Bloomington, IN *May 2008*
Bachelor of Science in Business Administration, Finance Concentration **GPA: 3.5/4.0**

- **Investment Banking & Capital Markets Workshop – Investment Management Track.** Faculty-selected into distinguished program that prepares students for careers in the investment banking and securities trading industry
- **Guanghua International Summer Program 2007.** Attended summer program at Peking University in Beijing focusing on China's recent international growth and economic policy
- **Chartered Financial Analyst (CFA) Level II Candidate.** Passed Level I of the CFA exam in December 2007

Purdue University College of Technology - West Lafayette, IN *May 2005*
Associate of Science in Computer Information Systems **GPA: 3.9/4.0**

- **"With Highest Distinction."** Recognized for academic excellence upon graduation

EXPERIENCE

Equity Research Associate *June 2008 – March 2009*
Leerink Swann – New York, NY

- Provided supporting role to health care information technology sector analyst in covering 12 stocks
- Actively compiled industry knowledge and monitored news flow related to the healthcare sector
- Participated in public and private conference calls with the executive teams of corporations
- Built extensive financial models in Excel and wrote investment analysis reports on subject companies
- Licensed with FINRA Series 7, Series 63, and Series 86/87

Telemarketing Fundraiser *September 2005 – January 2006*
Indiana University Telefund – Bloomington, IN

- Persuaded Indiana University alumni with a variety of backgrounds to donate funds to the school
- Required enthusiasm and selling skills to convince prospects that their support is helpful

Applications Developer *Summer 2004, 2005*
Crown Consolidated Industries – Chicago, IL

- Applied web-based ASP and MS-SQL Server to redesign the company's internal project support website
- Collaborated with a development team to create major expansion for the system and documented all changes

Founder and Applications Developer *May 2001 – Present*
WAK Productions . Com – (www.wakproductions.com)

- Launched eCommerce business to sell personally created Windows software utilities written in Borland Delphi
- Conducted business with several hundred customers in 17 countries

ACTIVITIES AND HONORS

IU Mad Money Club President (www.iuadmone.com)

- Initiated and successfully managed a campus-wide effort to bring CNBC's *Mad Money College Tour* to IU
- Interviewed on television for CNBC's *On the Money*, *The Today Show*, and Indianapolis news about our success

Toastmasters, Kelley School of Business Chapter

Merit-based Scholarships

- Recipient of the Colonel Henry Crown, Twin City Education Foundation, and Robert Half Technology scholarships for recognition of achievements in technology and business

INTERESTS & SKILLS

- Investing-related books, software application development, web blogging, working out, building a Lego city
- Financial Systems: Bloomberg, FactSet, Thomson One Analytics