



Aaron Schwindt

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Vision

To help conscientious investors achieve financial goals through sustainable investments

Experience

Investment Advisor

Living Earth Investments, Portland, Oregon, 2008-current

- *Research innovations and trends in sustainable economics, renewable energy, and socially responsible business practices*
- *Construct portfolios of equity investments screened for sustainability requirements*
- *Audit potential investments for sustainability and environmental criteria*
- *Prepare personalized performance reports and portfolio presentations*

Equity Research Analyst

McAdams Wright Ragen, Inc., Portland, Oregon, 2007-2008

- *Analyzed quarterly financial data for US community banks in order to screen for micro economic trends and explain these developments in context to the macro economic environment*
- *Created proprietary databases in MS Access to manage large amounts of financial and accounting data in order to screen for investment opportunities*
- *Distilled complex accounting and financial data into report format for investor use*
- *Constructed proprietary modeling and stress tests on banks for investment purposes*
- *Interviewed target company management to gather qualitative data*

Financial Analyst

Wedbush Morgan Securities, Lake Oswego, Oregon, 2003-2007

- *Created company reports and presentations for clients, management, and other stakeholders*
- *Mined data from the FDIC, Federal Reserve, and other regulatory agencies*
- *Created databases in MS Access to manage data and identify investment opportunities*
- *Contacted bank management to find illiquid investment opportunities*

Trading Assistant

US Bancorp Capital Markets, Portland, Oregon, 2000-2003

- *Created performance reports for client portfolios of commercial paper and short term bonds*
- *Maintained MS Access database of trade histories*
- *Acted as liaison between sales staff and operations department*
- *Corrected trading and accounting errors*

Education

University of Oregon, Eugene, Oregon

B.S. Psychology, Business Administration, 2000

Graduated Magna Cum Laude, 3.8 GPA