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**J. Derek Schmidly**

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| **Education** | **University of Missouri-Columbia**  **The Gordon E. Crosby, Jr., MBA Program**  Emphases: Finance and Management  Masters of Business Administration, May 2008  GPA – 4.0  GMAT - 650 | **Evangel University**  Majors: Biblical Studies; Biblical Languages  Minor: Finance  Bachelor of Arts, May 2006  GPA – 4.0 |
| **Experience**  **Experience (cont.)** | *Owner / Investment Advisor*, **Auxan Capital Advisors, LLC**, Springfield, Missouri (July 2008 – Present)   * Giving investment advice and providing financial planning services to clients * Developing statistical formulas to measure stock market risk, which are used to build actively managed investment strategies * Designing customized strategies for each client, and implementing the trades on their behalf * Providing business planning services to startup companies, preparing forecasts of their 5-year financials and coaching them in the process of writing a business plan and seeking financing through investors or lending institutions * Performing all marketing, website and accounting functions of the business * Seeking out new clients, setting up accounts, and managing ongoing client relationships * Giving into a Donor Advised Fund (simplified endowment) since 2009, which has totaled nearly $15,000 in donations as of February 2012 * Preparing to take the Series 3 and Series 34 Exams in March 2012 to expand my services into managed currency strategies   *Adjunct Professor,* **Evangel University**, Springfield, Missouri (Aug 2009 – Present)   * Teaching an advanced investment course on Fixed Income Instruments * Teaching an advanced investment course on Equities and Derivatives * Coordinating and leading the Student Investment Group, which meets every two weeks and gives students an opportunity to manage a real investment fund of about $30,000 * Contributing to EU being able to begin offering a degree in Finance for the first time * Making Series 65 study materials available to student who want to get their license as they prepare to enter the workforce   *Associated Person,* **Currensee Inc.,** Springfield, Missouri (Mar 2012 – Present)   * Passed Series 3, 34, and 30 Exams in March 2012 * Offering potentially high return currency (forex) strategies to clients through the Currensee Trade Leader Investment Program * Helping clients set up new accounts and teaching them how to use the technology to make better decisions and improve their performance   MU Graduate Assistantship: *Entrepreneurial Scholar*, **Missouri Innovation Center**, Columbia, Missouri (August 2006-May 2008)   * Responsible for market research of revenue potential and competitive landscape for start-up ventures *Equinosis, Nasopure, Warm Welcome,* and *IconicHealth* * Wrote narratives about the competitive landscape that became part of the overall business plans of our clients, which were then presented as an opportunity for private investment to Centennial Investors, a local angel funding group * Gathered data and statistically analyzed links between government funding and new venture creation in universities for a project sponsored by the Illinois-Missouri Biotechnology Alliance * Reviewed financial projections, valuation, and viability of business plans   *Equities Adviser and Analyst*, **Blaicol Capital Management** **LLC**, Springfield, Missouri (January 2006-January 2007)   * Passed Series 65 Exam in 2006 and registered as an Investments Adviser Representative * Managed investments in client accounts using iShares and ETFs, which were managed through Fidelity * Responsible for new strategy development and wrote scans using Metastock software and Stockcharts.com to speed up the process of finding investment opportunities * Experienced with equity trading (Since 2004)   Consulting Projects, **Delta Systems & Hermann Farm and Museum**, Columbia, Missouri (August 2007-May 2008)   * Worked on consulting projects as part of a 5-person team performing market analysis and delivering professional reports 30 and 50 pages long * Determined the revenue potential across Missouri and surrounding states of a new software product by Delta Systems for fundraising efforts at Chambers of Commerce * Performed market segmentation and wrote a marketing plan for attracting visitors to a new historical site west of St. Louis   *English Teacher*, **The Centre**, Chiang Mai, Thailand (June 2006 – August 2006)   * Lived in Thailand for seven weeks teaching two classes of undergraduate students four days a week and designed daily lesson plans and planned special weekly parties for the students * Acquired a novice/intermediate level of speaking, reading, and writing Thai | |
| **Volunteer** | * AGCU Supervisory Committee Member (2010 – 2011) * Evangel University Alumni Board (2012 – Present) * BNI Business Partners, Power Team Coordinator (2009 – Present) * EU Student Investment Group, Program Coordinator (2009 – Present) * Landmark Christian Center, Youth Worship Leader (2013 – Present) * James River Assembly, Keyboardist (2008 – Present) * James River Assembly, Life Group Leader (2009 – 2011) * Evangel University Chapel Worship Leader (2004 – 2006) | |
| **Honors** | * Springfield Business Journal 40 Under 40 Award - 2012 * Second place in MU New Venture Idea Competition – Non-Profit Category (2007) * Evangel University Varsity Football, Three-year letterman (2002-2005) * NAIA All-American Scholar Athlete (2003-2005) * National Dean’s List (2004-2006) * Graduated Summa Cum Laude (2006 & 2008) * EU Football Team Discipleship Award (2005) * EU Football Team President’s Award (2004 & 2005) * Many Endowed and Department Scholarships | |
| **Hobbies & Interests** | * Playing piano - Golf - Tennis - Cooking Thai - Investing - Jazz music - Learning languages - Social Entrepreneurship - International travel | |