

# JOSHUA E. SHARF

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## PROFILE

Analytical, energetic, enthusiastic research analyst with excellent verbal and written communication, mathematical, statistical, and analytical skills, eager to re-enter the financial industry. Skilled at critically analyzing source data, providing fresh insights, and suggesting innovative avenues for additional research and analysis.

## PROFESSIONAL SUMMARY AND SKILLS

- Complex financial analysis and modeling
- Advanced knowledge of Microsoft Excel and Access, Bloomberg, and CapitalIQ
- Mutual fund industry, fund and stock characteristics and classifications
- Fundamental equity research; NASD Series 7, 86/87 Licenses
- CFA Level I Candidate

## WORK EXPERIENCE

### Financial Research and Analysis

(March 2005 – June 2007)

- Research and write fundamental equity sell-side research reports using detailed Excel-based revenue models; produce valuations using peer group multiples, discounted cash flows, interviews with senior management. Review work of Junior Analyst. Supervise and direct work of Research Associate. Develop quantitative value-based stock-picking screens using Capital IQ. (*Wm. Smith & Co. brokerage*)
- White papers on the Size/Value-Growth Morningstar Style Grid for Janus- and Icon-funded project. Heavy numerical and statistical analysis of fund and index holdings and returns. Knowledge of Morningstar and Lipper fund classifications, and Morgan-Stanley, S&P, Russell, and Wilshire stock classifications. (*Athena Investment Services*)
- Researched & wrote white paper on high-conviction, high-concentration mutual fund investing for Janus as an independent study. (*Janus Funds*)

### Software Contractor and Developer

(August 1996 – Current)

- Develop and maintain web-based recruitment management application (*Ceridian*)
- Converted screens to manage national home-based pre- and post-natal nurse visitation program (*NCCFC*)
- Developed software to streamline and audit internal processes for SOX 404 compliance. Developed code to report and manage commodity swaps, basis swaps, options, and collars for hedging and risk management. (*Mark West Hydrocarbon*)
- Developed complex custom Access and SQL Server driven websites both independently and as member of development teams. Customers included Allied Vaughn, Denver Academy of Torah, International Holograph Manufacturers Association, eBags, Pen Group, Wedding Network, Corporate Express, and MCI
- Created complex, interconnected set of websites for *National Cattlemen's Beef Association*, sharing data, but with distinctive looks-and-feels
- Wrote detailed plan for moving major government health care legacy systems to web-based technologies (*OCHAMPU*)
- At *Fast 401(k)*, created administrative application to interface front-end web-based application with legacy transactional accounting system. Wrote and presented functional requirements document for administrative application
- Wrote document-sharing website for senior executives to coordinate MCI-BT merger (*MCI*)

**Defense and Intelligence Consultant**

(July 1987 – July 1996)

- Programmer/Intelligence Analyst for the defense and intelligence communities. Projects included satellite modeling, national missile defense, and drug control and enforcement.

**EDUCATION****MBA & Masters of Science in Finance** – Daniels College of Business 2005

Classes included: Financial Planning & Analysis, Financial Modeling (Excel & VBA), Portfolio Analysis, Securities Analysis, Fixed-Income, Multinational Finance, Risk Management (including Monte Carlo simulations), Accounting for Financial Decision-Making

**Graduate Teaching Assistantship** – DU Daniel Educational Technology Department**Bachelors of Science Physics, Second Major Mathematics**, University of Virginia 1987**PERSONAL**

Leadership Program of the Rockies

Class of 2006

Private Pilot's License

September 2000

**HONORS/AWARDS**

Daniels Scholar

2002-2005

Member Sigma Pi Sigma - National Physics Honor Society

1987

President, Jefferson Literary and Debating Society

1986

University of Virginia Echols Scholar

1983-1987

**TECHNICAL SKILLS**

- Microsoft Office including Access, Excel, Word, and Visio
- Equity research tools including Bloomberg, CapitalIQ, 10k Wizard