Evan Beauchamp, CFA

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EDUCATION

UCLA ANDERSON SCHOOL OF MANAGEMENT Los Angeles, CA
Master of Financial Engineering Expected Dec 2027

- *Relevant Courses:* Stochastic Calculus, Investments, Financial Accounting, Econometrics, Python for Data Analysis

UNIVERSITY OF CALIFORNIA, LOS ANGELES Los Angeles, CA
B.S., Mathematics / Economics Dec 2019

- *Relevant Courses:* Financial Econometrics, Mathematical Optimization, Real Analysis, Linear Algebra, Options / Futures / Derivatives

SKILLS & CERTIFICATIONS

- *Technical Skills:* Python (pandas, numpy, statsmodels, matplotlib), Claude, Claude Code, Excel, SQL
- *Platforms & Data:* Bloomberg, FRED, CME Group, Capital IQ
- *Certifications:* CFA Charterholder, CFA Python and Financial Modeling Practical Skills Modules

EXPERIENCE

L&S FRAMING Rocklin, CA
Residential framing contractor Nov 2021 – Sep 2026

Treasury Manager (Jul 2022 – Sep 2026)

- Built and ran a short-duration U.S. Treasury program across two separately managed accounts holding ~$30M; wrote the investment policy, selected custodians and brokers, and served as sole portfolio manager
- Positioned a rolling 3–12 month Treasury ladder using rate-path expectations from CME fed funds futures and FRED Treasury yields, rotating maturities through a full cycle of hikes, peak, and easing; generated $3.83M in total investment gains at a 4.45% annualized return (Sep 2022 – Sep 2026)
- Built a cash-flow forecasting model of payroll and project draws to size maturity buckets; staggered T-bill maturities to spread reinvestment timing and held all positions to maturity, meeting every liquidity need with no forced sales; produced performance attribution and strategy reports for management

Estimator (Nov 2021 – Sep 2026)

- Built pricing and job-cost models for multi-million dollar residential developments; identified lumber and truss pricing discrepancies that protected project-level margins
- Integrated inventory allocation and job-costing data into the company ERP, delivering real-time cost visibility to schedulers and project managers

PROJECTS

Concentrated Equity Portfolio: Fundamental Research and Financial Modeling 2022 – Present

- Manage a concentrated 12-stock quality-growth strategy across personal and friends-and-family accounts; screen for large-cap growth stocks and follow each company through earnings reports, call transcripts, and independent research
- Use Claude's equity research and financial analysis plug-ins to initiate coverage, build three-statement models and DCFs, update models, and track theses for portfolio holdings

Factor Attribution and Position Sizing in Python 2026 – Present

- Building two tools from Paleologo's Advanced Portfolio Management with Claude Code; the first regresses portfolio returns on the Fama-French five factors plus momentum to separate factor exposure from stock selection
- The second replaces equal weighting with Ledoit-Wolf covariance estimates and mean-variance or risk-parity sizing

ADDITIONAL INFORMATION

- *Interests:* Golf, Weightlifting, Old School RuneScape, Men's Softball, Retro Anime