Davis Sahr

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Summary

Finance professional with dual B.S. degrees in Finance and Marketing and experience across investment analysis, FP&A, financial modeling, and wealth management. Currently analyzes and monitors approximately $170M in client assets, with experience in investment due diligence, portfolio analytics, performance monitoring, financial statement analysis, valuation, forecasting, and client reporting. Advanced in Excel and Power BI, with additional experience in SQL. Holds SIE, Series 7, and Series 66 licenses. Skilled at translating complex financial and investment data into clear, actionable recommendations for clients and internal stakeholders.

Experience

CUI Wealth Management - Associate Advisor/Analyst *11/2025 - Current*
Salt Lake City, UT

- Analyze and monitor approximately $170 million in client investment assets, evaluating performance, allocation, fees, and investment-related risks.
- Conduct investment due diligence by analyzing fund performance, fees, asset allocation, risk metrics, and financial data in Excel to assess investment quality and identify areas of concern.
- Monitor client investment lineups through ongoing review of performance, expenses, benchmarks, and material developments; communicate findings through written reports and client presentations.
- Build Excel-based investment analyses using financial datasets, benchmarking tools, PivotTables, lookup functions, and scenario analysis to evaluate investment alternatives and identify performance trends.
- Prepare written investment analyses, charts, and PowerPoint presentations summarizing quantitative findings, key risks, performance trends, and recommendations for internal and external audiences.

Renaissance Financial - Financial Advisor *04/2025 - 11/2025*
Salt Lake City, UT

- Analyze client portfolios and investment options across public markets, retirement plans, and alternatives, evaluating performance, risk, fees, and allocation.
- Conduct investment and manager research to identify portfolio opportunities, risks, and asset-allocation considerations.
- Prepare and present portfolio analyses and investment recommendations, translating complex financial information into clear client guidance.

Beagle Investments - Financial Planning & Analysis Analyst *03/2023 - 04/2025*
Salt Lake City, UT

- Prepared financial analyses, forecasts, and performance reports for client-facing discussions, translating complex financial data into clear insights and recommendations.
- Partnered with clients and internal teams to review financial performance, identify key trends and risks, and develop data-driven recommendations tailored to business objectives.
- Built Excel models, dashboards, and presentation materials used in client meetings to communicate financial results, scenario analysis, and strategic recommendations.

Education

05/2025
University of Utah
Salt Lake City, UT
Bachelor of Science: Finance

- Relevant Coursework: Hedge Funds & Private Equity, Financial Modeling & FP&A, Corporate Finance, Investments, International Finance, Portfolio Theory and Management, Financial Statement Analysis
- Business Scholars Recipient
- Honors Merit Recipient
- Dean's List Honors (2021-2025 Academic Years)
- 3.8 GPA
- Participated in Finance Club, Academic Years 2021-2025
- Participated in Real Estate Club, Academic Years 2023-2025
- Member of Phi Delta Theta, 2021-2025, President of Risk Management 2023-2024

Skills

- Financial Modeling & Valuation
- Investment & Manager Due Diligence
- Portfolio Analysis & Performance Monitoring
- Advanced Microsoft Excel
- Financial Statement Analysis
- Market Research & Investment Reporting
- Client relationship management

Certifications

- Securities Industry Essentials (SIE)
- Series 7
- Series 66
- CPFA
- CFA Level 1 (Anticipated 02/2027)