CARLOS RUANO MORALES

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EDUCATION

UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School – Chapel Hill, NC May 2025
Master of Business Administration, Full-Time MBA Program

- Capital Markets and Investments Concentration
- Kenan-Flagler Fellowship
- Relevant coursework: Private Wealth Management, Derivatives, Project for Investment Management Experiential Learning (Prime), Investments I & II, Taxes and Business Strategy

St. Bonaventure University – St. Bonaventure, NY May 2020
Bachelor's in Business Administration, Major in Finance

- GPA: 3.81 / 4.0 (Magna Cum Laude) & The Austin Finan Award in Finance Honorable Mention
- D1 Soccer Player - A10 Conference Commissioner's Honor Roll: Fall 2016 and Spring 2017

EXPERIENCE

INTEGRATED WEALTH MANAGEMENT – New Braunfels, TX June 2025 - January 2026
Independent financial advisory firm offering personalized planning and investment strategies
Wealth Advisor

- Assisted in financial planning and advisory for a $120M portfolio, contributing to the development of risk-adjusted strategies for clients and integrating tax-efficient solutions to facilitate long-term retirement planning.
- Designed and deployed an automated Excel-based tracking tool, utilizing VBA macros to monitor the stage of the book of business, next relationship task, and streamline client data management and opportunity tracking.

SPEEDOUT ADVISORY – Valencia, Spain 2020-2023
Mergers and acquisition boutique specialized in sell-side transactions for industrial, and agricultural companies
Investment Banking Analyst

- Performed financial analysis through excel models in order to value companies for 30+ companies
- Produced Information Memorandums and Investor's Deck for sell-side operations, as well as designing a new company-wide layout used to pitch 200+ business proposals
- Created over 10 Financial Due Diligence reports for Private Equity funds, a new line of business resulting in a 33% increase in the company's revenues

IRONSIDE ASSET ADVISORS – Chapel Hill, NC Spring 2024
Semester long Experiential Learning with Mark Roberts, CIO of the company
Project for Investment Management Experiential Learning Class

- Optimized a spreadsheet for private equity managers by re-organizing data and turning it into an analytical tool, improving evaluation of sector exposure and trends.
- Led the evaluation and improvement of an internal asset allocation model, integrating forward estimates and Monte Carlo simulations to refine investment strategies.

STUDENTS IN MONEY MANAGEMENT (SIMM) – St. Bonaventure, NY 2018-2020
Student organization for the management of an equity portfolio
Head of the International Sector

- Led International Sector Expansion: Founded and managed a team of 10 analysts, expanding the club's portfolio to include non-US stocks, tracking 15% of the total holdings.
- Developed Financial Models and Reports: Created DCF models and presented top-performing investment ideas, contributing to a 13% year-over-year increase in fund performance

ADDITIONAL

- Work Authorization: USA – Green Card
- Languages: Spanish (Native), English (Native), French (Fluent), Catalan (Fluent)
- Certifications: SIE, Series 7, 66, Life and Health Insurance License, Microsoft Office Specialist, Bloomberg Market Concepts, French DELF B2
- Interests: Soccer, Racket Sports (Tennis, Squash, Pickleball, Padel), Equity Markets, Traveling, Video-Editing and Guitar, Web development (founded owlrsvp.com)`