

# Joseph Martinez

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## EDUCATION

### The University of Texas at Dallas

Master of Science in Social Data Analytics and Research  
Current GPA 3.67, Anticipated graduation date May 2027

January 2025 - Present  
Richardson, TX

### The University of Texas at Austin

Bachelor of Arts in International Relations & Global Studies  
Certificate in Advanced Arabic & North African Studies  
GPA 3.0

January 2018 - May 2023  
Austin, TX

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## RESEARCH EXPERIENCE

### UT Austin Department of International Relations and Global Studies

Undergraduate Student Researcher  
*Mentor: Michael W. Mosser, PhD.*

January 2023 - May 2023  
Austin, TX

Capstone: The Limitations of Digital Art by Diasporas Displaced by Violence.

- Examined through a combination of rhetorical analysis, digital ethnography, and historical contextualization, how 21st-century digital media has transformed diasporic art into a new form of political and cultural activism—one that enables displaced communities to preserve memory, connect across borders, and resist erasure through creative expression. Highlighted the systemic limitations of digital media.

### UT Austin Department of Anthropology

Undergraduate Student Researcher  
*Mentor: Sofian Merabet, PhD.*

June 2021 - August 2021  
Austin & San Antonio, TX

Field Report: The Islamic Center of San Antonio.

- Conducted qualitative ethnographic research on the cultural, social, and spatial dynamics of the Islamic Center of San Antonio (ICSA), the city's oldest mosque.
- Completed semi-structured interviews with congregation members, including Afghan, Arab, Somali, and American Muslim communities, to explore post-diasporic identity and interethnic social life.
- Produced extensive field notes and digital ethnographic documentation, emphasizing cross-cultural interaction, refugee resettlement, and interfaith perceptions.

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## TEACHING AND WORK EXPERIENCE

### IEQ Capital, LLC

Associate

December 2025 – Present  
Dallas, TX

- Partner with senior advisors to manage relationships with ultra-high-net-worth founders (\$10M–\$200M+ AUM), executing capital flows, portfolio reporting, and investment implementation while maintaining strict compliance and discretion.
- Develop investment recommendations through advanced financial modeling, including tax-efficient portfolio strategies, private market liquidity events (e.g., stock option exercises), and scenario analysis to inform capital allocation decisions.
- Create investor-ready materials and pitch decks, synthesize complex financial insights, and interface directly with clients on transactions and strategic decisions.

**Charles Schwab & Co, Inc.** April 2024 – November 2025  
 Financial Service Associate Westlake, TX

- Built long-term relationships & delivered tailored solutions to help clients achieve their financial goals.
- Through surveys and conversations, diagnosed pain points between representatives & clients.
- Tailored PowerPoints, Excel workbooks, and educational material to address pain points.

Financial Service Representative April 2024 - October 2024

- Promoted to Financial Service Associate in October 2024.

**Scale AI** January 2024 – April, 2024  
 AI Writing Contractor Southlake, TX

- Advanced the writing skills, editing & comprehension of various Large Language Modules (LLMs).
- Assessed limitations & possibilities of LLM capabilities; evaluated responses for safety bias & accuracy.

**Lincoln-Goldfinch Law** August 2021 – December, 2021  
 Paralegal Intern Austin, TX

- Analyzed, translated, & interpreted legal documents & organized evidence to build the preliminary cases.
- Researched the mistreatment of minority groups & state violence in the nation-states of origin.

**Self-Employed** September 2019 – May, 2023  
 Au Pair Austin, TX & Boston, MA

- Oversaw the afterschool care of two or more infant-to-grade-school-aged children at any given time.
- Established foundations in fitness, mathematics, & English/Arabic literacy through lesson planning.

**Beto O'Rourke Senate Campaign** August 2024 – December, 2025  
 Student Fellow Austin, TX

- Planned & organized tabling, door-to-door, & phone campaign events to motivate volunteers & voters.

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## LEADERSHIP, COMMUNITY SERVICE, AND EXTRACURRICULAR ACTIVITIES

**MakeDeathsCount** September 2023 – May 2024  
 Volunteer Outreach Officer Dallas, TX

- Researched & cold-called to forge partnerships for MakeDeathsCount.
- Established partnerships between MakeDeathsCount & American universities.

**Casa Marianella** September 2022 – May 2023  
 Volunteer Austin, TX

- Volunteered at the migrant home Casa Marianella, a transitory home for women and children who have just arrived in the United States.

**Student Conference on National Affairs (SCONA)** January 2014-May 2018  
 Undergraduate Attendee College Station, TX

- Worked with a team of undergraduate and graduate students from public, private, and military academic institutions to draft a policy proposal in competition with other policy writing teams.
- A policy proposal on water security infrastructure was awarded first place by a panel of US generals.

**Saint Mark the Evangelist Catholic Church** January 2014-May 2018  
 Confirmation Class Coordinator San Antonio, TX

- Planned, coordinated, and led confirmation classes for aspiring youth.

Volunteer Coordinator

- Coordinated volunteers to aid in the painting and refurbishing of homes of at-risk members of the community.

**San Antonio Fire Department** August 2017-May 2018  
 Volunteer Emergency Medical Technician - Basic San Antonio, TX

- Volunteered with ambulance runs to aid paramedics in emergency medical interventions across the metroplex.

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## HONORS & AWARDS

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| <b>Charles Schwab &amp; Co. Inc. Professional of the Month of May</b>                                     | 2024 |
| • Issued by the Schwab Service Academy.                                                                   |      |
| <b>Student Conference on National Affairs 65 Policy Proposal Champion</b>                                 | 2020 |
| • Placed first among several teams, selected by a panel of US generals.                                   |      |
| <b>Saint Mark the Evangelist Woman's Guild Scholarship</b>                                                | 2018 |
| • Community service scholarship issued by the Woman's Guild of Saint Mark the Evangelist Catholic Church. |      |
| <b>Presidential Volunteer Service Award, Gold Award</b>                                                   | 2018 |
| • Issued by the President's Council on Service and Civic Participation.                                   |      |

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## PROFESSIONAL ASSOCIATIONS

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| • FINRA Series 7 – General Securities Representative | 2023 - Present |
| • FINRA Series 65 - Uniform Investment Adviser       | 2026 - Present |
| • FINRA Series 63 – Uniform Securities Agent         | 2023 - Present |

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## SKILLS & PERSONAL INTERESTS

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- Proficient in RStudio, HTML, and ThinkScript.
- Proficient in Microsoft Excel, PowerPoint, Word, and Outlook.
- Proficient in Google Drive, Slides, Sheets, and Gmail.
- Proficient in Arabic.
- Hobbies include boxing, wrestling, reading, writing, and graphic design.