

EDUCATION

- 2020 - 2022** **London Business School**
Reading for Masters in Financial Analysis Degree
- 2019 - 2021** **Chartered Financial Analyst Institute**
Passed Level I (Dec. 2019); Level II candidate (May. 2021)
- 2015 - 2019** **The George Washington University, Washington, D.C, United States**
BBA Finance and Economics
GPA: 3.89/4 (Summa Cum Laude), Graduated within top 5% of all students, Dean's list all semesters
Full Athletic Scholarship: 3-hour daily training alongside extensive national travel and summer training camps whilst studying
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BUSINESS EXPERIENCE

- 2019 - 2020** **ARMSTRONG FLEMING & MOORE, Washington, D.C, United States**
Boutique Private Wealth Management Firm – Over 1 billion AUM
Client Associate (12 months)
- Re-structured the company's client onboarding practice by streamlining processes, overseeing inflow of over \$70 million dollars in new client money
 - Developed written proposals and investment plans for high net worth clients / prospects, contributing to a tailored client experience
 - Primary client contact for over 75 accounts, delivering detail orientated support through regular client interaction and execution of client requests contributing to retention rate of 98%
 - Oversaw paperwork and money movement processes relating to deceased clients, regularly liaising with lawyers to ensure a thorough and swift turnaround for family members
- 2018 - 2019** **Off Cycle Intern (7 months)**
- Researched daily market trends and presented findings to Portfolio Managers contributing to consistent benchmark outperformance
 - Produced and distributed over 40 client portfolio reports per month promoting enhanced client engagement
 - Adapted and modernised company's documentation storage processes leading to a companywide adoption of a more streamlined system
- 2017 - 2017** **PMX INDUSTRIES, Cedar Rapids, United States**
Leading Copper Alloy Manufacturer
Summer Intern (3 months)
- Managed project to analyse the accuracy of machine run rates used in accounting practices, identifying over/under estimation of machine effectiveness
 - Collected and deciphered machine data, utilising data analysis software to perform regression analysis to create a readable dataset used for machine run rate comparisons
 - Produced research report and presented new fluid database solution to management eventually leading to company's adoption of new system
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ADDITIONAL INFORMATION

- Played professional football from 2014-2015 for Queen of The South in the Scottish Championship
- Selected to represent Scottish National Team at youth level
- Four-year division I student athlete at university captaining football team in senior season
- Rose to become a "Veteran Leader" in university's Student Athlete Leadership Program
- Selected as an Arthur Ashe Jr. Sports Scholar at university
- Member of Beta Gamma Sigma Honors Society at university
- Corporate Finance Institute's Financial Modelling & Valuation programme participant
- Volunteer experience includes working with the following organisations: Special Olympics, Lemonade Day and Dawn's Ray of Hope
- London Business School Clubs : Finance, Football, North America