

First Last

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EDUCATION

University of State

December, 2019

B.B.A., Dual Concentration; Financial Markets, Economics

City, ST

- Student Government – Chair of Congress
- Voting Member on Strategic Planning and Budget Committee
 - Assist with University direction by ensuring fiscal responsibility and represent student needs and concerns.
- Founder and President of Consulting Club,
 - Student led consulting club helping regional businesses with Strategy and Marketing services.
- Member of Investment Club

WORK EXPERIENCE

Small Wealth Management Firm

May 2018 – Aug. 2018

Financial Planning and Investment Intern

City, ST

- Increased Investment Advisory AUM by more than \$500k through advanced VLookup code.
- Assist with tracking portfolio performance and rebalancing of portfolios on a monthly basis.
- Assisted in transition to new broker/dealer firm by creating a master client spreadsheet using VLookup on multiple criteria columns as well as pivot tables making sure we were grabbing relevant and correct data for each client from multiple sources.
- Create portfolio models for prospective and current clients in Morningstar.
- Ensure clients were complying with IRS regulations by calculating and taking the yearly required minimum distribution.

Transportation Start-Up

Jan. 2018 – May 2018

Business Analyst

Remotely

- Understand key business processes of specific industries pertaining to transportation, urban mobility, smart cities, and connected car systems.
- Assist with go-to-market strategy and develop relationships with companies to form strategic partnerships.
- Design databases, stored procedures, reports, and data input interfaces using SQL and transfer SQL databases into Tableau for visual analysis and presentation.
- Strategic analysis of companies working on Software as a Service and Internet of Things systems within the mobility and transportation industries.
- Segment and analyze Venture Capital firms and their investments in the industry supply chain.

Day Camp Job

Month Year – Month

Year

Program Staff

City, ST

- Core responsibility #1.
- Core responsibility #2.

SKILLS & INTERESTS

- **Skills:** Morningstar, FactSet, Bloomberg Terminal, Excel and Advanced Excel Code, Tableau, Powerpoint
- **Interests:** Working out; Traveling; Cooking