

# Daniel Rosenblatt

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## EDUCATION

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### University of Connecticut

**GPA: 3.32 Major GPA: 3.62**

Bachelor of Science in Business

**Major:** Finance **Minor:** Resource Economics

**Storrs, CT**

Expected Dec. 2015

## BUSINESS EXPERIENCE

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### Merrill Lynch

*Global Wealth Investment Management Summer Analyst*

**New York, NY**

Jun. 2015 – Aug. 2015

- Developed an organizational system for 65 clients that streamlines a complete client profile for a Sr. Financial Advisor and team
- Created Net Worth Statements through the Wealth Management platform for top clients producing an inflow of external assets
- Coordinated all logistics for the semi-annual prospecting event for 12 guests who have in excess of \$10MM+ net worth
- Established a relationship between a Sr. Financial Advisor and Van Cleef & Arpels to co-host a client appreciation event
- Accompanied a Sr. Financial Advisor to major mutual funds, hedge funds, and private REIT events
- Collaborated with a Business Manager on implementing new closed end funds, private equity offerings, and mutual fund matrices

### Jersey Shore Portfolio Management

*Equity Research & Sales Analyst Intern*

**Loch Arbour, NJ**

May 2014 – Aug. 2014

- Analyzed companies in all 9 sectors of the market by finding trends in historical quarterly financial statements and price charts
- Utilized Morningstar/IBD databases to access annual reports, charts, and historical prices to help predict future growth
- Assisted in the execution of trades, including stop and limit orders on company portfolios using Trader WorkStation

### American Bureau of Shipping

*Finance Intern*

**New York, NY**

Jun. 2013 – Aug. 2013

- Conducted research through industry specific databases and earnings reports to maintain information on the industry
- Used earnings reports to create spreadsheets with various information such as revenues and capital expenditures

### Pioneer Trading Academy

*Marketing Representative*

**Storrs, CT**

Sep. 2012 – May 2013

- Promoted an investment class to various organizations on campus through presentations in an assortment of meetings

## LEADERSHIP & ACTIVITIES

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### Finance Society

*Active Member*

**Storrs, CT**

Sep. 2014 – Present

- Engage in weekly topical discussions and present on economic and industry analysis, including IPO, M&A, and LBO
- Organize and schedule industry professional guest speakers for weekly presentations

### Alpha Epsilon Pi

*Vice President of Philanthropy & Alumni Relations Chair*

**Storrs, CT**

Sep. 2014 – May 2015

- Structured a brand new philanthropic event for the Upsilon Kappa chapter and raised over \$9,000 for the MS Society
- Published a monthly newsletter with fraternal updates to inform alumni of our chapters well-being and upcoming philanthropies
- Contacted alumni and raised \$6,800 for fraternal restructuring, HuskyTHON, and our first ever alumni weekend

### Pillars of Wall Street

*Student*

**New York, NY**

Sep. 24 – Sep. 25

- Completed intensive two-day boot camp with Pillars of Wall Street
- Seminars included: "Accounting for Bankers" and "Introduction to Valuation"

## SKILLS, RELATED COURSEWORK & INTERESTS

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**Related Coursework:** Investments & Security Analysis, International Finance, Real Estate Investments, Fixed Income Securities

**Computer Proficiency:** Salesforce, Microsoft Office, Merrill Lynch Wealth Management WorkStation

**Volunteer Experience:** Friendship Circle, HuskyTHON, Habitat for Humanity, Jewish National Fund, MS Society, Make a Wish

**Interests:** Country Music, Fishing, Ice Hockey, New York Yankees, Wake Boarding