

# Name

Cell Phone • Email

## EDUCATION

### Tufts University

Bachelor of Arts in International Relations (Middle Eastern Focus); Minor in Finance

Medford, MA

Expected May 20xx

**Relevant Courses:** Microeconomic Theory, Business Law, Entrepreneurship and Business Plan, Industrial Economics, International Economics, Entrepreneurial Marketing, Entrepreneurial Finance, Statistics, Calculus, Linear Algebra

University of Queensland, Brisbane, Australia

Spring 20xx

## FINANCIAL EXPERIENCE

### Neuberger Berman

*Portfolio Management Intern and Legal & Compliance Intern*

New York, NY

June – August 20xx

- Researched and analyzed portfolio holdings as part of ongoing due diligence efforts of industry-leading equity portfolio manager specializing in master limited partnerships (\$2.5B AUM as of 8/20xx)
- Prepared report on future prospects of liquid natural gas and presented findings to portfolio management group
- Reviewed investment management agreements with attorneys in Legal & Compliance department and documented specific terms, including most favored nation clauses, for institutional and high net worth clients
- Studied articles from industry publications involving regulatory actions and fines imposed on financial firms and developed summaries for inclusion in firm's annual training presentations
- Developed filing system for documentation associated with pledge and lien accounts at firm
- Partnered with firm's corporate social responsibility arm and Association to Benefit Children by volunteering to help underprivileged children explore New York Metropolitan Museum of Art

*Wealth Management Intern – Dallas, TX*

June – August 20xx

- Prepared client asset analyses in Microsoft Excel for meetings with high net worth and ultra-high net worth individuals
- Updated client information in computer database to ensure that portfolio managers had current information
- Provided initial training to new full-time employee including instruction on compiling asset summaries
- Researched charitable foundations, leading to several taken on as new clients

### Wellington Capital

*Intern*

Brisbane, Australia

April – June 20xx

- Communicated with shareholders regarding upcoming shareholder votes in funds collectively worth \$230MM AUD
- Assisted supervisors by compiling and binding research materials, helping with mailings, and printing as required

## LEADERSHIP

### Tufts Financial Group

*Vice President*

Medford, MA

September 20xx – Present

- Serve on the executive board of a student-run investment group managing \$150,000
- Liaise with alumni to develop outreach initiatives such as finding alumni speakers and coordinating events
- Led a team of 20 students and analyze and identify high-potential, undervalued stocks and present to TFG members
- Research and pitch companies for inclusion in portfolio; successful pitches include Express Scripts and Exxon Mobil
- Mentor junior analysts by explaining financial metrics and valuation methods, including DCFs and Comps
- Initiated Analyst Resource Center with 100+ books and additional online resources with industry expertise and advice

### Office of Residential Life and Learning, Tufts University

*Resident Assistant*

Medford, MA

August 20xx – Present

- Advise 40 undergraduate students, organize floor programs, and help resolve personal, academic, and administrative issues
- Monitor two dormitories, ensuring the safety and security of 300 residents
- Participate in extensive training focused on community building and conflict resolution

### Tufts Consulting Collective

*Project Manager*

Medford, MA

January 20xx – Present

- Lead a team of student consultants to provide pricing and marketing strategy for a media start-up
- Perform financial valuation for the company to attract investors

## SKILLS AND INTERESTS

**Language:** Fluent in English and Chinese, Proficient in French

**Computer:** Proficient in Visual Basic, Excel, PowerPoint, Bloomberg, Dealogic, SAS, and Stata

**Interests:** Rafting, Rock Climbing, Soccer, and Historical Fiction