

Sean J. Kavanaugh

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EDUCATION

Indiana University, Kelley School of Business - Bloomington, IN May 2026
Bachelor of Science in Business GPA: 3.6/4.00

Major: Finance

Honors & Achievements:

Securities Industry Essentials Exam - St. Charles, IL

- Certificate Holder

Series 63 Exam – Sycamore, IL

- Certificate Holder

EXPERIENCE

Morgan Stanley – Oak Brook May 2025 – August 2025

Private Wealth Management Intern

- Supported a team managing 250+ client relationships and \$700M+ in Assets Under Management, gaining direct exposure to the client advisory process
- Observed and analyzed 20+ client calls to identify needs and preferences, enhancing understanding of effective solutions and strengthening client relationship skills
- Researched and evaluated 2 alternative investment funds preparing written and slide-based analyses for team of advisors
- Created 10+ model portfolios using Morningstar Advisor Workstation, optimizing asset allocation across equities, fixed income, and alternatives to meet varying client risk/return objectives

Black Sheep Golf Club May 2023 – May 2025

Honor Caddie

- Assist golfers with club selection, provide accurate yardage readings and offer insightful advice on course strategy
- Maintain a high level of professionalism and customer service ensuring a positive experience for players
- Develop strong relationships with members and guests leading to increased satisfaction

M14 Hoops – Aurora, IL April 2021 – August 2022

Basketball Coach

- Coached groups of up to 30 players teaching the fundamentals of basketball
- Utilized effective communication and motivation skills to ensure a high level of engagement from players ages 10-18

ACTIVITIES

Theta Chi Fraternity – Bloomington, IN September 2023 – December 2024

Vice President

- Elected to an 8-man Executive Board to oversee over 190 active members
- Lead weekly chapter meetings

President of Standards

- Attended four day National Chapter Leadership training in Indianapolis
- Enforced rules to maintain a safe and welcoming environment for 75 live-in members
- Assessed and collect fines for house violations

SKILLS/INTERESTS

Technical: Microsoft Excel | Microsoft Access | Microsoft PowerPoint

Interests: Leadership | Basketball | Golf | Aston Villa Football Club | Travel