

**William E. Takes**  
33 Varick Court  
Rockville Centre New York 11570  
Email: william.e.takes@vanderbilt.edu  
Cell: 516-384-5899

## Experience

---

### **MERRILL LYNCH 2020 SUMMER SPEAKER SERIES**

Received on the job training regarding the operations on the advisory branch at an investment firm.  
Assisted financial advisors by providing administrative support. (Internship canceled due to pandemic)

### **TRINITY MANAGEMENT INTERNSHIP**

Observed stock market tendencies, learned the process of short- and long-term equity trades, learned how to apply my own finances to the stock market, participated in market discussions and speculated with several experienced equity traders.

### **TENNESSEE VALLEY AUTHORITY INVESTMENT CHALLENGE ANALYST**

Actively managed a \$500,000 investment portfolio in competition with 24 other schools, where the goal is to outperform the S&P 500.  
Was placed in a group of 5 classmates that evaluated existing and prospective stocks in the portfolio of an assigned sector and presented analyses to the other members of the class.

## Education

---

### **VANDERBILT UNIVERSITY • JUNE 2022 • BACHELOR OF ARTS**

DOUBLE MAJOR IN ECONOMICS AND SPANISH WITH A BUSINESS MINOR  
CURRENT GPA: 3.5, DEAN'S LIST

### **CHAMINADE HIGH SCHOOL • MAY 2018 • ACADEMIC HIGH SCHOOL DIPLOMA**

Four-year Honor Roll, member of National Honor Society  
Graduated with high honors

## Volunteer Experience and Leadership

---

Head lifeguard during summers since 2016, Vanderbilt Moneythink tutoring program, Vanderbilt Global Immersion – Antigua, Guatemala.