

# ALEX SWEENEY

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alexjsweeney.com



## EXPERIENCE

### Specialist, Trader Solutions

#### TD Ameritrade

12/2019 - Ongoing Omaha, NE

- Provide clients with 45 minutes, 1-on-1 training sessions on how to use Thinkorswim, our advanced trading software.
- Assess the clients' current level of knowledge, and educate them further in the trading or investing strategies they wish to explore.

### Finalist, NEXT Innovation Challenge

#### Charles Schwab

07/2021 - 09/2021 Virtual

- Schwab-TDA joint idea competition. Placed 4th out of over 300 ideas.
- Idea was an internal problem-solving forum, where employees could post and vote on problems they are encountering.

### Entrepreneurship Innovation Program

#### TD Ameritrade

07/2018 - 01/2019 Omaha, NE

- Tasked with designing, testing, and developing potential business solutions, with the goal of project approval/funding
- Designed a demo of a Personal Finance App called Top Dollar

### Specialist, Trade Desk

#### TD Ameritrade

02/2018 - 11/2019 Omaha, NE

- Assist inbound active trader clients (most active/complex).
- Order entry, relationship building and management, risk analysis. Education on complex stock and options strategies and products.

### Financial Services Intern -> Representative

#### TD Ameritrade

02/2017 - 01/2018 Omaha, NE

- Shadowed various departments to learn about TDA's systems.
- At the end of the internship, we presented solutions we had developed to management for implementation.
- Became a licensed stockbroker/customer service representative.

### Owner/Co-Founder

#### Oil & Water Deck Refinishing

05/2014 - 09/2020 Minneapolis, MN & Omaha, NE

- Create and implement both digital and print marketing strategies.
- Developed a Niche skill, learned how to grow/oversee a business.

## ACHIEVEMENTS



### Built a Family Business while in High School/College

Started after my senior year of high school, the business has been passed down through both of my younger brothers, who currently run it.



### Certified Financial Professional

Licensed with Series 7, 63, and 3



### UNO Investment Club Winner

Secretary of a student lead portfolio managing over \$750,000. Convinced the club to invest in FB in 2017, which produced a 48% return.

## EDUCATION

### B.S. of Business Admin.

#### University of Nebraska at Omaha

09/2013 - 05/2017

- Concentration in Business Finance & Investment Science

## PASSIONS



### UI Design

As someone who teaches people how to use complex software, I enjoy making technology easier to use.



### Technology

When it comes to anything tech related, I am fascinated by how it works and how it is shaping our world.



### Improvement

No matter if it's a product, a process, or even myself, I am obsessed with the idea that anything anyone can get better.