**William Eriksson**

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# Education

**Florida Southern College |** Lakeland, FL *Expected Graduation:* *May 2026*

*Bachelor of Science, Finance | Minor: Business Analytics*

**Relevant Coursework**: Financial Analysis, Real Estate Analysis & Valuation, Marketing Principles, Investments, Business Analytics, Legal Environment of Business

# Work Experience

**Herschend Family Entertainment |** Orlando, FL *May 2025-Present*

*Project Coordinator* *(Strategy & Hospitality Development)*

* Built a 50+ slide strategic deck for 20+ Palace Entertainment properties, featuring park profiles, financial benchmarks, SWOT analyses, and distance maps to support lodging and development planning
* Rebuilt key tools like the Image Tracker and developed a streamlined Image Approval Form, improving cross-team workflows between creative, legal, and brand teams
* Wrote focused business intelligence summaries that connected hospitality and entertainment trends to internal initiatives and investment strategies
* Collaborated with strategy, legal, and creative teams to ensure all deliverables were aligned, brand-compliant, and actionable for leadership decision-making

**Northwestern Mutual |** Naples, FL *May 2024-April 2025* *Financial Representative*

* Conducted financial analyses to assess clients’ financial situations and develop tailored planning solutions
* Monitored market trends and economic indicators to identify investment opportunities, including real estate sector performance
* Managed a portfolio of 12+ clients monthly, ensuring personalized financial strategies and consistent relationship management
* Strengthened communication and analytical skills through client meetings and ongoing financial plan development

**Lee Health Research & Strategic Analysis | Fort Myers, FL** *May 2022-June 2022* *Volunteer, Bright Futures Scholarship Program*

* Assisted in organizing internal databases and research files to support ongoing strategic initiatives
* Collaborated with healthcare analysts to understand cost analysis, financial workflows, and organizational reporting
* Gained early exposure to healthcare data systems, sparking interest in tools like advanced Excel and SQL

# Collegiate Involvement

**Investment Club Member** **|** Lakeland, FL

*Florida Southern College Investment Club**August 2024-January 2025*

* Participated in workshops focused on investment analysis and portfolio management.
* Researched real estate investment trends, including trade area analysis and retail property performance.

**Florida Southern College Swimming |** Lakeland, FL*August 2022-Present*

* Competed in Conference Championships as a Conference Finalist.
* Developed strong time management and discipline balancing academics and athletics.

# Skills & Certifications\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Technical Skills:** Financial Modeling, Data Analysis, Microsoft Excel (PivotTables, VLOOKUPs, Conditional Formatting), PowerPoint (Executive Presentations), Market Research, Dashboard Building, Data Interpretation, Smartsheet, SQL (Foundational)

**Certifications:** Bloomberg Market Concepts (BMC), Smartsheet Project Management – The Complete Beginners Course