

EDUCATION

Columbia University, Fu Foundation School of Engineering and Applied Science

Full-Stack Coding Bootcamp

New York, NY

October – April 2021

- Lead group project and achieved an A-, deployed working applications using HTML, CSS, and Javascript

American University, Kogod School of Business

Bachelor of Science, Finance GPA: 3.72/4.0

Washington, D.C.

May 2018

- Coursework includes Financial and Managerial Accounting, Intermediate Corporate Finance, Applied Calculus, Investment Analysis, Information Technology, Business Law, and Bloomberg Certification

- Kogod School of Business Dean's List Spring 2016 and 2017

- Awarded first place by jury of outside marketing executives in Kogod's 2017 product marketing competition

Marist College

Marist College Bridge Program GPA: 3.84/4.0

Poughkeepsie, NY

Fall 2014 – Spring 2015

- One of three high school juniors in NY State invited to complete their senior high school year as part of the Marist College Bridge Program

- Awarded a merit scholarship after first semester for high academic achievement

WORK EXPERIENCE

Bloomberg LP

Global Index Sales

New York, NY

July 2018 - Present

- Worked with a global team to sell Bloomberg Barclays fixed income, equity, commodity, multi-asset, and strategy indices

JPMorgan Chase & Co.

Private Banking Summer Analyst

New York, NY

June - August 2017

- Collaborated with an integrated team of bankers, investors, wealth and capital advisors to prepare asset allocations, account summaries, performance reviews, and "pitch decks" for client meetings
- Researched key executives at insurance, venture capital, and hedge funds to identify potential new clients
- Attended meetings with integrated team and ultra high net worth clients to report portfolio performance and proposed new portfolio strategies and investments
- Curated list of weekly market trends for various asset classes including equities, fixed income, alternatives, and foreign exchange for weekly market drills

Northwestern Mutual

Financial Advisor Intern

Washington, D.C.

September - October 2016

- Worked with a team to understand client financial situations and develop holistic financial plans to achieve their financial goals
- Organized client book and set up semi-annual calls with financial advisors to ensure that the client has optimized portfolio allocation in current market conditions

Wells Fargo Advisors

Wealth Management Summer Intern

La Jolla, CA

June - August 2016

- Proposed new media marketing strategies for wealth management firms
- Recommended products and services that best fit client needs
- Collaborated with annuity wholesalers which resulted in improved client presentations

ACTIVITIES AND MEMBERSHIPS

Alpha Kappa Psi, Professional Business Fraternity

President

Washington, D.C.

April - September 2017

Financial Management Association

Vice President

Washington, D.C.

Spring 2016 - Present