

Dipum Patel

70 Robinhood Drive
OBJECTIVE

Etters

PA

17319

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Highly determined and skilled individual seeking full-time employment in the financial services industry, where I may further apply my analytical, leadership, communication, organizational, and technical skills.

EDUCATION

Pennsylvania State University Graduation: May 2014
Bachelor of Science in Finance

PROFESSIONAL EXPERIENCE

Ameriprise Financial

October 2013 – Present

Wealth Management Intern

- Reevaluate client's portfolio performance by using Morningstar and Thompson to research equities and mutual funds.
- Assess each client's balance sheet to create an appropriate and tailored financial plan to address their retirement goal.
- Create growth and expense reports with graphs using excel to communicate each client's portfolio performance.
- Organized every client's paperwork chronologically and sorted it by class for optimal and secure record keeping.
- Studying Series 7 educational materials to obtain proper licensing by the end of March 2015.

Jos. A. Bank

May 2011 – Present

Sales Executive

- Strive to finish sales quotas with positive numbers and increase the sales figures for the store and lead the region.
- Prepare sales information for customers to assist their individual financial needs for maximum satisfaction.
- Assist and lead fellow executives in sales, organization, and preparation to optimize and maximize store potential.

Bank of America Merrill Lynch

May 2012 – August 2012

Wealth Management Intern

- Reconstructed and engineered client portfolios according to appropriate client risk profiles and asset allocations.
- Administered The Maldonado Group's portfolio which held multiple clients and million in liquid assets.
- Evaluated quantitative analysis on equity portfolio profit margins to make decisions on asset and security reallocation
- Classified various economic data and valued risk for ETF, Mutual Funds and other market linked investments
- Gathered financial data from various organizations' accounting records to follow up on possible client leads.
- Performed administrative tasks and email communications, allowing FA to increase focus on primary client needs.

EXTRAS

Finance and Investment Club- Penn State University

August 2012 – May 2014

Vice President

- Managed responsibilities for career development by advising on different job opportunities presented in finance.
- Provided fundamental education financial derivatives such as pricing and valuing options as well as option strategies.
- Mentored fellow students in equity research analysis as a sector leader for investment ideas in the school portfolio.
- Lead the fellow students as a sector leader in a detailed presentation of securities for investing in a school portfolio.

Skills

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|----------------------------|---------------------------|----------------------|
| • Equity Research Analysis | • Time Management | • Financial Analysis |
| • Strong Analytical Skills | • Bloomberg | • Financial Modeling |
| • Team Skills | • Excellent Verbal Skills | • Excel and VBA |

- **Activities**

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- The Presidents Volunteer Service Award, Attended 2010 National AICPA, 1st Place in Shell Oil Case Study, CFA Society of Philadelphia Annual Forecast Dinner, Energy Rodeo 2013 in Houston