

Christopher Schaefer

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FINANCIAL SERVICES CANDIDATE

Driven, intelligent, hardworking professional seeking entry-level opportunities in the **Financial Services** industry. Proven success utilizing reasoning, communication and relationship-building techniques. **Core strengths and abilities include:**

- | | | |
|---------------------------------|----------------------|----------------|
| •Financial Analysis Knowledge | •Securities Research | •Market/Sector |
| •Strategic Planning Development | •Money & Banking | •Business |
| •Options & Futures Funds | •Business Law | •Mutual/Hedge |

EDUCATION

Bachelor of Science in Finance - Manhattan College, Riverdale, NY
May 2012

Minor in Management

Major Course GPA: 3.55

Key Coursework: Corporate Finance; Strategic Management; Portfolio Analysis and Investments; Financial Intermediaries; Multinational Finance; Business Statistics; Macroeconomics; Introduction to Marketing; Microeconomics; Principles of Accounting

FINANCIAL SERVICES EXPERIENCE

UBS Financial Services Inc, New York, NY
2012 - May 2012

January

Financial Intern

- Assist Financial Advisors in **servicing client investment** accounts including, but not limited to, deposit/withdrawal, portfolio rebalancing, performance and associated fees
- Maintain** meticulous records of correspondences, conversations and meetings with clients
- Update **Asset Allocation** lists for existing clients

MetLife, Hauppauge, NY
January 2012

December 2011-

Financial Services Intern

- Provided assistance to Financial Services Representatives by assisting with their client's **investment portfolios**
- Created **tracking records** for representatives which streamlined response time
- Developed client lists ensuring **compliance** requirement were followed

KC Ward Financial, Ronkonkoma, NY
August 2010

July 2010 -

Financial Intern

- **Researched** and created prospective client lists for senior brokers
 - Qualified **prospective clients** adhering to firms standards
 - Conducted** phone calls to prospective clients introducing the firm and their services
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ADDITIONAL WORK HISTORY

Columbus Circle Wine and Spirits, New York, NY
March 2010 - Present

Cashier: Assist clients with purchases | Maintain Inventory | Answer phones and process orders
| Manage corporate clients

Stony Brook University Hospital, Stony Brook, NY

May 2009 – January 2010

Volunteer: Assisted in Triage Area | Patient Relations | Transported lab/blood work to corresponding departments

PROFESSIONAL DESIGNATION

✓ **Eligible for License in Life, Health and Disability Insurance**

ACTIVITIES

Member, Manhattan College **Track and Field Team**

Fall 2009 – May 2012

• **Compete** in the Pole Vault Event spearheading Manhattan College in achieving their 30th consecutive MAAC Conference Championship