

# JALPA PATEL

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## OBJECTIVE

Secure an entry level position within the field of finance where I can build upon my education and experience.

## EDUCATION

**Bachelor of Science**, Finance, Graduated: January 2012  
**Rutgers Business School**, Newark, NJ; GPA: 3.468

## EXPERIENCE

**Bank of Tokyo Mitsubishi UFJ**, New York, NY

June 2011 - September 2011

**Intern**, *Corporate Risk Management Division of Americas*

- Learned and worked on fundamentals of credit processes, use of the Credit Application and Borrower Rating system
- Generated and maintained daily reports on Global Credit Application & Rating System, Package Tracking report, Transfer & Termination
- Made improvements in formulas (V-Look up, IF statement, net present value, and etc) and general layout
- Created step-by-step procedures for daily reports

**First Investors Corporation**, Woodbridge, NJ

January 2011 -

May 2011

**Senior Intern**, *Finance*

- Prepared and put together financial proposals based on client needs, goals and financial assets and liabilities
- Helped Financial Advisors conduct their daily activities - client/prospect follow-up, scheduling, business generating activities, etc.
- Searched, scrubbed and contacted potential candidates from various job boards and college career centers for financial services representative positions to explain position details and schedule interviews if interested
- Created business prospecting strategies, planned staff meetings and sales debriefings

**Automatic Data Processing**, Florham Park, NJ

July 2010 -

December 2010

**Intern**, *Sales Operations Analyst*

- Developed cost effective processes utilizing mainframe, database, and Microsoft office expertise to create over 200 tabs of business intelligence reports detailing 401(k) metrics of over one million participants with over \$30 Billion in assets
- Collaborated with teams to help financial institutions such as Merrill Lynch, Morgan Stanley, Goldman Sachs, Sun America, and Deutsche Bank to produce business intelligence reports used to segment the 401(k) market and target revenue
- Standardized reporting structure which resulted in condensed reports, fewer redundancies among departments, and a quicker delivery schedule

**Vantage Custom Classic**, Avenel, NJ

June 2007 - August 2009

*Data-Entry*

- Managed inventory records in A/P and A/R ledger
- Handled customer orders to ensure on-time delivery; Interacted with employees to provide assistance

## **ACTIVITIES**

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- Member, Rutgers Finance Society  
2009 to 2011
- Member, Indian Students Association  
2009 to 2011

## **SKILLS**

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Microsoft Office with higher proficiency in Excel (Macros, Pivot Tables, and V-Look Ups), Reuters, Lotus Notes and Business Object

*Languages:* Fluent in Gujarati and Hindi; basic in Spanish

**REFERENCES AVAILABLE UPON REQUEST**