**OBJECTIVE**

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**

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

**Activities**

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