

# LONDON CHAMBERLAIN

london.chamberlain@utexas.edu • (228) 369-9309 • linkedin.com/in/londonchamberlain • londonchamberlain.com

## EDUCATION

<b>The University of Texas at Austin</b>	Bachelor of Science, Economics Minor: Finance, Wealth Management Certificate: Programming and Computation (Computer Science) Cumulative GPA: 3.65	May 2026
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## PROFESSIONAL EXPERIENCE

**The Fox Alliance Wealth Advisors - Wealth Management Intern, Client Liaison;** Austin, TX September 2021 - Present

- Launch MS Excel financial models that automate trade calculations and have enabled \$20M in investments across 900 accounts
- Produce and maintain Power BI dashboards utilizing database of over 230K entries to visualize firm's AUM and revenue trends
- Develop discounted cash flow models to evaluate financial advisor book of business acquisition opportunities valued at over \$3M
- Overhaul client-facing investment proposal documents using Excel VBA model to improve proposal creation efficiency by 80%
- Conduct lead-conversion research on 30 industry competitors to pitch optimized SMS outreach strategies to managing partners

**Westlake Securities, LLC - Equity Research Analyst Intern;** Austin, TX October 2024 - December 2024

*Westlake Securities is a boutique middle market investment bank founded in 2003 and headquartered in Austin, Texas, United States*

- Conducted financial modeling, valuation, and equities research to support firm's investment decisions and client recommendations
- Monitored daily market information for 2 public equities, utilizing earnings guidance and sector data to update price expectations

**James A Baker Coaching - Technology Consultant;** Austin, TX December 2023 - January 2024

- Modified technology infrastructure by transitioning CRM and scheduling software to achieve 20% reduction in annual expenses
- Implemented HubSpot CRM and OnceHub client scheduling software to monitor 42 planned client meetings/month on average

## LEADERSHIP EXPERIENCE AND ACTIVITIES

**Texas Blazers - Vice Chair of Fundraising, Selections Committee** Fall 2024 - Present

*Participating in honorary campus service organization committed to community service at UT and Austin, including Eastside HS*

- Increase endowment fundraising by 51x since Fall 2023 by developing recurring student-led fundraising initiatives in community
- Raise over \$8K for UTIMCO-managed endowment to support campus food pantry's mission to combat food insecurity on campus
- Contribute 1.5 hours weekly to tutoring and mentoring students in high school credit recovery and college readiness programs
- Assist 8 HS seniors with college and scholarship applications, offering guidance and support with essays and financial aid forms

**The University of Texas at Austin - Transfer Interest Group Seminar Instructor & Mentor** Fall 2024

- Facilitated weekly 1-credit-hour discussion seminars to support 13 transfer students in their successful transition to the university
- Advised students by elevating campus and career opportunities over 16 sessions, increasing student campus involvement by 77%

**Collegiate DECA - Texas Vice President** Spring 2023 - Fall 2024

- Designed 385-member Texas career conference, including competitive event series, to facilitate student professional development
- Established Collegiate DECA chapter at Rice University, alongside formation of officer team and recruitment of 50 active members
- Increased member engagement by 14% through establishing 53-member professional networking and soft-skill development event

**Phi Theta Kappa International Honor Society - College Project Officer** Fall 2022

*Directed 36-person student committee that produced college's improved campus safety initiative during one academic semester*

- Coordinated 7 student-led, on-campus police interviews and distributed 600 flyers to raise awareness of rising community crime
- Fundraised \$2.2K to host 5 campus police community engagement events and provided 242 students with free safety resources

## HONORS

• Forbes Best-In-State Wealth Management Teams Award (The Fox Alliance Wealth Advisors, 3x)	Spring 2023 - Present
• 4 <sup>th</sup> Place Collegiate DECA International "Starting a Business" Competitive Event Pitch (44 teams)	Spring 2024
• 1 <sup>st</sup> Place Phi Theta Kappa (PTK) College Project Pitch (1 of 40 at TX Regional Conference)	Spring 2023

## ADDITIONAL INFORMATION

**Computer Skills:** MS Excel, MS PowerPoint, MS Power BI, Python, SQL, Stata, R, Tableau, Bloomberg Terminal, FactSet, Capital IQ

**Certifications:** FINRA Series 7, Series 66, & SIE, Project Destined CRE Fundamentals Certificate, A.CRE Financial Modeling

**Relevant Coursework:** Corporate Finance, Investment Management, Financial and Managerial Accounting, Macroeconomic Theory

**Interests:** I.M. Soccer, Money Stuff (Newsletter/Podcast), Trail Running, Vinyl Records, International Motorsports (F1 and Le Mans)