

Adam Koprucki

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EXPERIENCE

UBS – New Orleans, LA

Intern, October 2009 – May 2011

- Create financial goals for multiple clients based on investment profiles
- Develop checklists to track the distribution of IPOs among investment advisors
- Distribute proprietary market analysis and commentary to new and existing clients
- Assist in creating marketing materials to attract potential clients for investment advisors

Loyola Student Managed Investment Fund

Analyst, January 2011 – May 2011

- Present bi-weekly research reports analyzing the oil and gas industry
- Successfully presented a buy recommendation in early 2011 for Wynn Resorts
- Recommended to reduce municipal bond ETF position due to state budget shortfalls
- Evaluate current holdings and proposed new equity holdings to fund managers

Merrill Lynch – New Orleans, LA

Summer Analyst, May 2009 – August 2009

- Rebalanced portfolios for clients based on risk portfolios
- Monitored industry news and financial results for infrastructure, energy and technology companies
- Utilized equity research tools to screen investment ideas for investment advisors
- Created Excel spreadsheets to track economic indicators

Alpha Kappa Psi – Business Fraternity

VP of Professional Chair, September 2009 – May 2011

- Organize professional business events for fraternity members and students
- Contact local business leaders to participate in seminars and discussion panels

EDUCATION

LOYOLA UNIVERSITY – COLLEGE OF BUSINESS, NEW ORLEANS, LA

- Bachelor of Business Administration in Finance, May 2011

ACTIVITIES/INTERESTS

- Personal Investing
- Swimming
- Golf
- Loyola Community Action Program – Student Volunteer
- Sigma Phi Epsilon

SKILLS

- Computer Programs - Skilled in Microsoft Excel, Outlook, PowerPoint and Word