

## **PROFILE**

Analytical professional seeking a position in the financial services industry. I am motivated to gain valuable experience by dedicating myself to a thorough understanding of the quantitative and qualitative elements of analyzing investment opportunities and generating value for the organization.

## **EDUCATION**

**Lehigh University** – Bethlehem, PA  
B.S., Accounting, Finance, Real Estate

*Expected Graduation May 2024*

### **Relevant Coursework**

Corporate Financial Policy, Investments, Real Estate Development, Real Estate Finance, Real Estate Investment, Micro/Macroeconomic Analysis, Intermediate Accounting I & II, Cost Accounting

## **SKILLS**

- Microsoft Office (Excel, Word, PowerPoint)
- Financial Modeling, Financial Statement Analysis
- SQL/Data Analysis
- Customer Service, Sales, Interpersonal skills

## **PROFESSIONAL EXPERIENCE**

**Control Management Intern** – Wells Fargo – *Charlotte, NC*

*June 2023-August 2023*

- Used analytical skills to generate a weekly reports for senior leaders highlighting the team's progression with risk management issues and means of remediation
- Assisted team members in identifying inherent risks and developing controls to reduce and/or eliminate risk
- Efficiently completed ad-hoc tasks with strict deadlines for workloads acquired from multiple team members such as: writing control test plans, documenting control procedures, and updating systems

**FP&A Intern** - Penske Truck Leasing - *Green Hills, PA*

*May 2022-August 2022*

- Designed and maintained two financial models in Excel to report and forecast accounts payable data and accrued liabilities data
- Identified and instituted KPI's that helped quantify and explain drivers for changes in various GL accounts across the balance sheet and income statement for use in senior leaders' P&L forecast
- Queried and analyzed data from multiple sources using basic SQL code and data visualization software such as QlikView and Tableau

**Supervisor** – Mountain Warehouse – *Pottstown, PA*

*August 2019-August 2021*

- Trained and new sales associates in skills such as: register, sales, and other clerical functions
- Exhibited customer service/sales skills by providing insight on products, processing complaints, and a thorough understanding of the customer's needs
- Led the team throughout multiple weeks in sales KPIs such as: average transaction volume, items per customer, and add-on sales

## **LEADERSHIP & VOLUNTEERING**

**Life Scout** – Boy Scouts of America Troop 99

- Elected to the position of Senior Patrol leader for one year
- Worked with local organizations for volunteering and educational opportunities for scouts such as food drives, flag services, and church services
- Organized weekly meetings to teach scouts life skills and moral behaviors in society