

# GEORGE KAPLAN

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## EXPERIENCE

**J.P. Morgan Chase & Co** | Summer Analyst; Columbus, OH

*Jun 2023 – Aug 2023*

- Analyzed BRGS event data, identifying a -388.8% YoY decrease in 2023, improving the event planning process, while scheduling weekly meetings with the manager on current internship progress and end-of-summer goals.
- Created a dashboard to optimize resolutions and insights, resulting in a 20% decrease in average response time.
- Automated cost center purge using Alteryx, processing 85.5M+ transactions while improving data accuracy.
- Presented to executive findings in analysis of employee recognition survey with 6.5K comments + 170K responses.
- Integrated First Republic Bank cost centers via SQL and Excel, aligning IDs for accurate cross-bank comparisons.

**Duffy Kruspodin** | Tax Accounting Intern; La Jolla, CA

*Jan 2023 – Apr 2023*

- Prepared 50+ individual, corporate, partnership, and fiduciary tax returns, knowing state, and federal tax laws.
- Researched tax information on over 100 active clients and communicate findings to managers and senior partners.

**Mitchell International** | Finance Operations Intern; Virtual

*May 2022 - Aug 2022*

- Streamlined 100+ business partners billing processes to transition documentation to the Enlyte business identity.
- Founded structure for \$7M monthly in billing operations with 40 new company pages to improve productivity.
- Coordinated bi-weekly progress reports on the structure of 400+ documents through Excel conditional formatting.

**Best & Company CPAs** | Tax Accounting Intern; San Diego, CA

*Jan 2022 - May 2022*

- Monitored and documented daily transactions into Time-Entry Software posted balances on Accounts Receivable.
- Finalized 250 clients on Lacerte Tax Software to upload calculated totals on File Center for final active client billing.
- Calculated owed balance for 140 clients and 5 business entities, including fiduciaries and imputed charges in Excel.

## LEADERSHIP & ACTIVITIES

**Alpha Kappa Psi, Mu Sigma** | Vice President of Finance; San Diego, CA

*Dec 2022 - Present*

- Designed a \$34K semester budget, tracking daily transactions and reported dues distribution for 140+ members.
- Incorporate functionality monitoring 140+ members across 9 sheets in payments and outstanding balances.
- Conduct 20+ meetings to review member outstanding debts, updating status and decreasing national dues by 20%.

**TEDxSDSU** | Chief Financial Officer; San Diego, CA

*Jul 2022 – Present*

- Increased funds by 18% by designing presentation, highlighting 10-yr history and distributing to 100+ sponsors.
- Founded a \$8K budget, visualizing progress on 800-tickets sales goal and surpassing initial 30-day period by \$1.8K.

## EDUCATION

San Diego State University | Fowler College of Business; San Diego, CA

*Aug 2020 - Dec 2023*

Bachelor of Science - Business Administration; Finance and Information Systems

GPA: **3.45**

**Awards:** Deans List – 3.5+ GPA & 12.0+ Units (4 Semesters)

**Affiliations:** National Association Asian American Professionals (NAAAP), Certified Financial Analyst Society (CFASST), Noah Hytken Memorial Fund, TEDxSDSU, College of Business Council, Alpha Kappa Psi, Delta Chi, Associated Students

## SKILLS & INTERESTS

**Techniques:** Quantitative Finance, Performance Metrics, Tableau, Financial Analysis & Modeling, Data Analysis & Visualization, Dashboards, Data Integration, VBA Macros, Business Valuation, P&L Forecasting, Process Improvement

**Tools and Technologies:** Alteryx, SQL, Office 365, Tableau, Lacerte Tax, Oracle Database, Visio

**Certifications:** Corporate Analyst Development Program Virtual Experience Program, Tax Level 1 Exam: Federal Individual Tax Returns, JP Morgan Excel Skills Virtual Experience Program, Excel Skills for Business Virtual Experience Program, Excel Associate - Microsoft Office Specialist for Office 2019 and Office 365

**Interests:** Financial Literacy, Credit, Personal Finance, Hiking, Travel, “Rich Dad, Poor Dad” by Robert Kiyosaki