

James (Jimmy) Littley

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Education

Lehigh University, Bethlehem, PA

Graduation: May 2025

- Bachelor of Science in Business and Economics; Dual Major: Finance and Business Analytics
- 3.85 GPA, Dean's List (2021, 2022, 2023)
- Relevant Coursework: Investments, Corporate Financial Policy, Business Analytics, Financial Accounting, Managerial Accounting, Microeconomics, and Statistical Methods

Holy Ghost Preparatory High School, Bensalem, PA

Graduated: June 2021

Relevant Experience

Incoming Financial Services Advisory Intern

June 2024 - August 2024

KPMG US, New York, NY

Consulting Intern

May 2023 - July 2023

Gen-USA Consulting, Milan, Italy

- Demonstrated due diligence, business awareness, and attention to detail in conducting market research, analyzing competitors and presenting findings in an organized manner to assist Italian based companies successfully transition to the United States market
- Leveraged problem-solving, adaptability, and web research skills to successfully search for 30 properties and contact information, contributing to client satisfaction across various industries

Wealth Management and Financial Planning Intern

January 2023 - May 2023

Tristate Financial Advisors, Philadelphia, PA

- Analyzed financial reports, models and client goals to evaluate and model risk for 50 diverse clients, ranging from average to affluent wealth levels
- Worked to diversify client portfolios and provided financial guidance for retirement while fostering collaboration to enhance client relationships and ensure client satisfaction

Financial Analyst

August 2021 - Present

Rights Portfolio & Investment Management Group Analyst Development Program

- Conduct weekly market research on industrial sector, pitch stocks to 50 analysts and executive members based on market research and financial models
- Establish an understanding of financial statements and other financial principles
- Actively manage a portfolio of over \$150,000

Extracurricular Activities & Community Service

Level 4 USA Ice Hockey Official

June 2018 - Present

USA Hockey, Atlantic District

- Referee 5-7 Tier I & II hockey games for U8 – U18 age levels and college age levels per week
- Complete score sheets; build rapport with coaches and partners; educate players regarding the rules of hockey; and mentor new officials

Chi Phi Fraternity, Lehigh University

Vacation Bible School Camp Counselor, Woodside Church, Yardley, PA (2016-2022)

Technical Skills

- Financial Modeling, SQL, Tableau, Microsoft Access, Excel, PowerPoint, Word, HubSpot, Google Suite