

Julissa Morales

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EDUCATION

Babson College

Bachelor of Business Administration

Wellesley MA

Anticipated Graduation: May 2026

Awards: Babson Diversity Leadership Scholar

Licensing: Securities Industry Essentials (SIE) – *In Progress*

Relevant Coursework: Financial Markets and Instruments, Digital Technology, Business Law, Business Intelligence Data Analytics

PROFESSIONAL EXPERIENCE

Brown Advisory | *Summer Analyst* | June 2025-August 2025

- Managed a \$10M multi-asset investment portfolio, aligning strategies with client's short-term and long-term financial goals to optimize performance and risk management
- Conducted fixed income credit research on basic materials sector by analyzing credit spreads, leveraging ratios and macroeconomic drivers (Fed policy, inflation) to issue buy/sell/hold recommendations
- Utilized Tableau and Snowflake to identify KPI reporting deficiencies, and evaluated automation tools to streamline and modernize legacy reporting applications

Elevance Health | *Projects & Operations Management Intern* | May 2024-August 2024

- Analyzed 2023 and 2024 financial data to identify cost-reduction opportunities, strengthen budgeting accuracy and support long-term financial planning
- Audited 10% of Massachusetts physicians data to maintain accuracy for member-facing platforms, improving data integrity and compliance
- Streamlined document routing systems to accelerate claims processing and enhance operational accuracy

Campus Multimedia | *Business Marketplace Student Associate* | WFH October 2023-April 2024

- Conducted market research on school partnership opportunities across the U.S., turning insights into recommendations to connect schools with companies and build specialized programs
- Coordinated closely with internal teams through regular discussions to advance partnership development and ensure alignment with client objectives

Voya Financial | *IT Intern* | WFH May 2023-August 2023

- Advised acquisition of VFI SLK by analyzing legal contracts and financial statements
- Designed engagement portal for Voya's 5,000+ employees to help integrated recently acquired, VFI SLK, and promote inclusivity
- Developed process documentation for sales and client teams to update a client's onshore/offshore place

LOFT | *Sales Associate* | October 2021-December 2024

- Analyzed daily and hourly sales data through spreadsheets, tracking units per transaction, dollars per transaction, returns, and total sales to identify performance trends
- Implemented merchandising strategies by creating new product sections from scratch, ensuring cohesive style, color coordination, and brand alignment to maximize customer engagement and drive sales
- Executed quarterly inventory audits using scanning systems to evaluate stock levels, identify damaged or slow-moving products, and prepare reports to guide replenishment and allocation decisions

LEADERSHIP & PROFESSIONAL DEVELOPMENT

Fitzgerald Imports | *Consultant* | Boston, MA August 2024-December 2024

- Explored opportunities for branching into retail market to diversify revenue streams and enable direct interactions with customers, while formulating an exit strategy and succession plan to ensure long-term business continuity
- Implemented innovative marketing strategies utilizing social media and advertising to enhance brand visibility

Management Leadership for Tomorrow | *Career Prep Fellow* | Washington, D.C. January 2024-Present

- Accepted into a selective 18-month professional development program for high-achieving diverse talent
- Completed business case studies and assignments to grow leadership and technical skills
- Attended conferences hosted by industry leaders such as Deloitte, LinkedIn, and Target

AFFILIATIONS & SKILLS

Affiliations: SquashBusters and Junior Achievement

Language: Spanish (native)

Skills: Intermediate in Tableau, Intermediate in SQL, Intermediate in FactSet, Intermediate in R

Interests: Squash, Coding, Dancing