

BRIAN BALLESTEROS

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EDUCATION

University of Illinois Chicago – College of Business Administration

Chicago, IL

Bachelor of Science in Finance

Class of 2025

- Relevant Coursework: Intro to Finance, Macroeconomics, Investments, International Financial Markets, Options & Futures Markets

WORK EXPERIENCE

Arbor Financial Advisors

Chicago, IL

Summer Intern

June 2024 – Sep 2024

- Identified and set appointments with potential clients
- Conducted cold calls to set meetings with new clients, averaging 200 dials per day
- Collaborated with mentor to develop and implement client-specific financial strategies, gaining hands-on experience in wealth management
- Conducted market research to help customize a financial plan that addresses a client's goals
- Understood and translated financial terminology for clients to understand.

Chipotle Mexican Grill

Chicago, IL

Service Manager

June 2021 – Present

- Troubleshoot critical items to ensure a daily variance of under 1% and MTD variance under 0.6%
- Dispatch deployment & preparation charts to effectively surpass projected sales and throughput by 10%
- Coordinate a team of 7 cooks preparing food to achieve over \$10,000 in daily sales
- Guide store operations and ensure proper cooking and recipes while prioritizing food safety
- Complete cash audits twice a month during peak times to ensure proper cash handling
- Validate cash deposits and card payments at the end of the day while accounting for employee meals

ENGAGEMENT

Portfolio Management Team (UIC)

Chicago, IL

Analyst

Sep 2021 – Current

- Manage a portfolio comprising 5 different industry sectors, totaling 20 different companies
- Create a fundamental analysis of companies to decide whether it could be a positive addition to the portfolio
- Optimize investment strategies to maximize returns while continuously outperforming the S&P500 by 8% year over year
- Create financial models to value stocks and assess investment opportunities

New Covenant Marketing Campaign

Chicago, IL

Member

March 2024 – April 2024

- Created a marketing campaign that introduced an online learning platform to potential learners
- Leveraged social media and online advertising channels to maximize reach and engagement

ADDITIONAL INFORMATION

Skills: Fluent in Spanish

Computer: Proficient in Excel, PowerPoint, Bloomberg

Certifications: Completed Bloomberg Certification Program

Interests: Soccer, Running, Poker, Snowboarding, Skydiving