

Education

University of San Diego

San Diego, CA 2013

BBA, Finance; Economics Minor

- Awarded Trustee Scholarship and Bishop Maher Scholarship
- Relevant Courses: Investments, Financial Management, Financial Accounting, Managerial Accounting, Financial Statement Analysis
- Studied abroad at Comillas Pontifical University in Madrid, Spain

Work Experience

BlackRock

Wilmington, DE

Investment Accounting Analyst

11/2013- Present

- Worked across the department with multiple teams and clients, providing an opportunity for significant exposure and client facing
- Lead major initiatives to enhance the overall client relationship and developed new automated tools and updates for process improvements across the team
- Prepared, reviewed and ensured timely distribution of monthly accounting packages under strict deadlines
- Performed data checks for client's asset positions and income data in order to ensure accuracy, this includes month to month changes in interest income, net amortization and book yields.
- Generated Schedule D's and STAT Supplemental Interrogatories, along with AM Best, S&P, and Fitch Surveys for year-end reporting.

HD Supply

San Diego, CA

Financial Analyst Intern

06/2013- 08/2013

- Developed and implemented a fully functional training program for a new sales analytics tool, held training classes for National Account Managers and produced a supplemental-training manual that was distributed company wide
- Generated fiscal period-end reports that analyzed YTD sales growth and YTD part margin growth. The reports were distributed to the National Account Managers to assure they were meeting benchmarks and maximizing their market potential
- Assisted in developing an Excel based sales tool to benchmark the sales team against their colleagues at the 80th percentile and provide national account managers with a breakdown for each product category for each of their clients in the hospitality vertical

UBS

San Diego, CA

Wealth Management Intern

09/2011-12/2011, 1/2012-8/2012

- Used the Morningstar tool to build a portfolio of sector ETF's such as treasuries, REIT's, and financials of fixed income and equity securities; based the asset allocation of the portfolio off a bullish chart index
- Inquired and evaluated clients' financial risks, needs, and objectives, and prospected investments tailored according to their risk and return profile and provided each client with an in-depth financial goal analysis
- Suggested and monitored different investment strategies based off the client's needs and implemented performance measures with the wealth management team to increase client services

Keefe, Bruyette, and Woods

New York City, NY

Equity Summer Analyst

06/2011-08/2011

- Prepared financial models and compared companies in the insurance industry versus their peers by measuring their underwriting capabilities, catastrophe risk, as well as analyzing their investment portfolios, among other metrics
- Initiated a report on American Financial Group by performing a full valuation and compared the company to its peers in the industry; conclusion of the report resulted in an outperform rating due to its competitive advantage in the crop insurance sector
- Performed analysis on 6 property and casualty corporations through examination of financial statements, management discussion with equity analysts and company guidance, in order to publish quarterly KBW equity research reports

Activities

University of San Diego

Intramural Sports, Team Member and Captain

- Participated in and served as team captain for the intramural basketball league held on campus
- Devoted 5-7 hours a week in preparation for games

Additional Attributes

Dual Citizenship

- Eligible to work in the Euro Zone

Computer Skills

- Proficient in Microsoft Word, Excel, PowerPoint, Outlook, Access, SAP Portal, Morningstar, PAM and Aladdin