

REGHAN LYNN HESSER

Finance Major at Lehigh University pursuing a career in Private Wealth Management
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Education

Lehigh University, College of Business	Bethlehem, PA
Finance Major: Bachelor of Science in Business and Economics (GPA: 3.55)	01/2024 - 12/2024
Paris School of Business	Paris, France
Study Abroad Program in International Business, Luxury Brand Strategy and Finance	01/2023 - 05/2023

Experience

Sterling Investment Advisors	Berwyn, PA
Wealth Management Intern	06/2023 - 09/2023
<ul style="list-style-type: none">Supported CPMs and CFPs in providing high-net-worth clients with guidance to meet their complex financial needsAided in overseeing 618.7 million in assets across 1,271 customer accountsResearched investments and implement designed portfolios according to a client's risk tolerance and personal financial goalsCreated Morningstar and PortfolioCenter reports to accurately display each client's past and current portfolio performancesLeveraged client data to assess individual tax, insurance, budget, education, and retirement plansAided in Sterling's marketing revamp, including website redesign, client onboarding efforts, AI implementation, and renewed collaboration with Worth Magazine	
The Giving Tree Wellness Center	Scranton, PA
Assistant Manager	05/2021 - 09/2022
<ul style="list-style-type: none">Ensured superior experience to over 100 customers per day by taking and preparing orders timely and accuratelyReinforced operational procedures for cash handling, safety, security, facilities management, and inventory managementLeveraged customer data to display best-selling products and to maintain proper inventory to maximize salesMonitored employee hours and timeliness to complete, verify, and submit payroll accurately	
Baker Tilly	Clarks Summit, PA
Application Support Specialist	12/2020 - 04/2021
<ul style="list-style-type: none">Provided direct member application support for the distribution of over \$350m in CARES Act funding to 300,000 members of the Navajo NationUpdated the Navajo Nation's database records for over 50,000 members' information that had gone missing years prior to the establishment of the hardship programCounseled customers who were challenged by the program's documentation requirements with empathy	
Bethlehem Public Library	Bethlehem, PA
Volunteer/Tutor	01/2021 - 02/2024
<ul style="list-style-type: none">Provide alternate methods of understanding and field questions for South Bethlehem middle school studentsMentor groups of students who are interested in furthering their academic successes and finding new interests	
Alpha Phi Women's Fraternity	Bethlehem, PA
House Manager	01/2021 - 02/2024
<ul style="list-style-type: none">And Director of Social CommunicationsServe as external voice for the 41 live-in house members of the Fraternity to the UniversityOrganize 10 yearly activities and events of 75+ students to promote community engagement and team buildingOversee marketing efforts to showcase merchandise sales, fundraising opportunities, and philanthropic events	

Skills

Proficiency in all Microsoft Office Platforms • Tableau • R Language • Morningstar • EMoney • Python

Bloomberg ESG Certified

Strong Presentation Skills and Customer Service Experience