

RIKIN PATEL

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EDUCATION

UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN

Graduated: December 2019

Bachelor of Science in Finance w/ High Honors

GPA: 3.78/4.00

CFA CANDIDATE

Passed Level 1 CFA Exam in June 2019

PROFESSIONAL EXPERIENCE

ONE TREE BRANDS LLC.

January 2020 – Current

Financial Analyst

Kansas City, MO - Schaumburg, IL

- Worked closely with top level managers and accounting department to analyze and report financial statements
- Facilitated transition to leaner business operations through thorough gross profit analysis; led to a 10% increase in gross profit from our wholesale department
- Streamlined our inventory turnover to help increase our storage and warehousing efficiencies; thus, leading to an improved bottom line

SHEARCIRCLE

May 2019 – August 2020

Co-Founder

Bloomington, IL

- Founded an online platform which connects professionals, business owners, and clients in one integrative online hub
- Managed development and marketing teams across the globe, working closely with them to turn an idea into a functioning business
- Worked through startup stages such as ideation, customer segmentation, marketing, branding, legal procedures, financial planning, and much more
- Utilized Microsoft Office tools such as Word, Excel, and PowerPoint to develop deliverables for investors and clients

APC ACCOUNTING & TAXES

May 2017 – August 2017

General Accounting Intern

Addison, IL

- Worked with many small businesses on tasks ranging from general accounting, journal entries, bank reconciliation, tax returns, and organizing client meetings
- Developed a new client's book from scratch to understand more about client backgrounds and fundamentals of their business operations
- Managed all communication and collaboration with a designated new client, in order to develop client interaction skills

THE RED LION

April 2018 – August 2019

Crew Member

Champaign, IL

- Contributed to a lively and friendly environment by responding to customers with urgency and accuracy
- Raised over \$4,000 of sales individually in one day through marketing efforts and utilization of social media

ACTIVITIES

BUSINESS COUNCIL

September 2016 – December 2019

Technology and Charity Fundraising Committee

Champaign, IL

- Selected to be a part of an organization that helps professional development and networking through participation in activities within three different pillars: social, service, and professional
- Organized events to raise money for designated charity, committee raised over \$10,000 for designated charities

INVESTMENT PORTFOLIO ORGANIZATION

February 2017 – May 2017

Analyst

Champaign, IL

- Learned about various investment topics ranging from financial statements, technical stock analysis, to company valuation through an interactive classroom environment
- Worked with team to produce two stock pitches, presented thorough fundamental and technical analysis of both stocks

SIGMA BETA RHO FRATERNITY

August 2016 – December 2019

President

Champaign, IL

- Devised year-long goals and systems to facilitate organizational growth, while balancing each active member's needs
- Managed a six-person executive board, while overseeing all of the fraternities' affairs and making many high level, controversial decisions

SKILLS & CERTIFICATIONS

- Earned **Accelerated Computer Science Fundamentals** certificate by University of Illinois at Urbana-Champaign
- Proficient in **Java/Python/C++**; learned through various computer science courses in school and self-teaching
- Skilled in **Bloomberg and CapIQ**; learned through university workshops and organizations such as Prime and Investment Portfolio Organization
- Languages: Fluency in **Gujarati and Spanish**. Learned Gujarati at home and Spanish through AP Spanish
- Skilled in **Word, Excel, and PowerPoint**; learned through application in multiple business classes, organizations, and work. Tasked with creating financial models, project tracking spreadsheets, and various presentations