

Name

Cell Phone • Email

EDUCATION

Tufts University

Bachelor of Arts in International Relations (Middle Eastern Focus); Minor in Finance

Medford, MA

Expected May 20xx

Relevant Courses: Microeconomic Theory, Business Law, Entrepreneurship and Business Plan, Industrial Economics, International Economics, Entrepreneurial Marketing, Entrepreneurial Finance, Statistics, Calculus, Linear Algebra

University of Queensland, Brisbane, Australia

Spring 20xx

FINANCIAL EXPERIENCE

Neuberger Berman

New York, NY

Portfolio Management Intern and Legal & Compliance Intern

June – August 20xx

- Researched and analyzed portfolio holdings as part of ongoing due diligence efforts of industry-leading equity portfolio manager specializing in master limited partnerships (\$2.5B AUM as of 8/20xx)
- Prepared report on future prospects of liquid natural gas and presented findings to portfolio management group
- Reviewed investment management agreements with attorneys in Legal & Compliance department and documented specific terms, including most favored nation clauses, for institutional and high net worth clients
- Studied articles from industry publications involving regulatory actions and fines imposed on financial firms and developed summaries for inclusion in firm's annual training presentations
- Developed filing system for documentation associated with pledge and lien accounts at firm
- Partnered with firm's corporate social responsibility arm and Association to Benefit Children by volunteering to help underprivileged children explore New York Metropolitan Museum of Art

Wealth Management Intern – Dallas, TX

June – August 20xx

- Prepared client asset analyses in Microsoft Excel for meetings with high net worth and ultra-high net worth individuals
- Updated client information in computer database to ensure that portfolio managers had current information
- Provided initial training to new full-time employee including instruction on compiling asset summaries
- Researched charitable foundations, leading to several taken on as new clients

Wellington Capital

Brisbane, Australia

Intern

April – June 20xx

- Communicated with shareholders regarding upcoming shareholder votes in funds collectively worth \$230MM AUD
- Assisted supervisors by compiling and binding research materials, helping with mailings, and printing as required

LEADERSHIP

Tufts Financial Group

Medford, MA

Vice President

September 20xx – Present

- Serve on the executive board of a student-run investment group managing \$150,000
- Liaise with alumni to develop outreach initiatives such as finding alumni speakers and coordinating events
- Led a team of 20 students and analyze and identify high-potential, undervalued stocks and present to TFG members
- Research and pitch companies for inclusion in portfolio; successful pitches include Express Scripts and Exxon Mobil
- Mentor junior analysts by explaining financial metrics and valuation methods, including DCFs and Comps
- Initiated Analyst Resource Center with 100+ books and additional online resources with industry expertise and advice

Office of Residential Life and Learning, Tufts University

Medford, MA

Resident Assistant

August 20xx – Present

- Advise 40 undergraduate students, organize floor programs, and help resolve personal, academic, and administrative issues
- Monitor two dormitories, ensuring the safety and security of 300 residents
- Participate in extensive training focused on community building and conflict resolution

Tufts Consulting Collective

Medford, MA

Project Manager

January 20xx – Present

- Lead a team of student consultants to provide pricing and marketing strategy for a media start-up
- Perform financial valuation for the company to attract investors

SKILLS AND INTERESTS

Language: Fluent in English and Chinese, Proficient in French

Computer: Proficient in Visual Basic, Excel, PowerPoint, Bloomberg, Dealogic, SAS, and Stata

Interests: Rafting, Rock Climbing, Soccer, and Historical Fiction