

Name

XX XXXX St

Boston, MA XXXX

(617) XXX-XXXX | XXXX@student.uml.edu

EDUCATION

University Of Massachusetts

Lowell, MA

Bachelor of Arts in Economics

Expected Graduation Date: August 2013

- **GPA:** 3.0
- **Relevant Coursework:** Micro and Macro Economic Theory, Business Finance, Investment Strategies, Statistics I & II, Health Economics, U.S. Economic History, Management Calculus

WORK & LEADERSHIP EXPERIENCE

Bulge Bracket

Great Boston Area, MA

Intern, Risk and Compliance

June 10, 2013 – August 16, 2013

- Located and tracked Cash Exceptions in excess of \$5MM
- Located and tracked Overdrafts in excess of \$10MM
- Reported to senior management daily concerning Overdrafts, Cash Exceptions, and Risk Memos
- Identified and monitored reasons for Overdrafts, Cash Exceptions, and Risk Memos that fell outside the specific high risk threshold

Bulge Bracket

Quincy, MA

Intern, Wealth Management Services

December 25, 2012– January 31, 2013

- Performed reconciliations to locate price breaks in Mixed Asset Summaries
- Confirmed security prices for Client Eaton Vance Investment Managers
- Assisted in the implementation and data transfers between two accounting platforms
- Assisted in conversion of custody clients from outside custodial bank after acquisitions

Bulge Bracket

Boston, MA

Intern, Institutional Investor Services

June 6, 2012– August 31, 2012

- Worked with multiple pricing sources to accurately price securities / verify NAV
- Verified daily rates of return across multiple portfolios
- Performed general and Subsidiary ledger reconciliations
- Assisted in processing high volume asset transfers between portfolios

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: Familiar with Valuation techniques including but not limited to:

- Comparable Company Analysis
- Discounted Cash Flow Analysis
- Leveraged Buy Out Analysis

Certifications & Training: CFA Level 1 Candidate (December 2013)

Volunteer: Above the Clouds, Boston & Franciscan Children's Hospital, The Rodman Ride

Activities: Varsity Golf (Team Captain), IJGA summer challenge (1st Place), Mayors Cup (3rd place), Varsity Hockey

Interests: Active Amateur Golfer (Index 4.2)