

Name
XX XXXX St
Boston, MA XXXX
(617) XXX-XXXX | XXXX@student.uml.edu

EDUCATION

University Of Massachusetts <i>Bachelor of Arts in Economics</i>	Lowell, MA Expected Graduation Date: August 2013
<ul style="list-style-type: none">• 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 <i>Intern, Risk and Compliance</i>	Great Boston Area, MA June 10, 2013 – August 16, 2013
<ul style="list-style-type: none">• 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 <i>Intern, Wealth Management Services</i>	Quincy, MA December 25, 2012– January 31, 2013
<ul style="list-style-type: none">• 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 <i>Intern, Institutional Investor Services</i>	Boston, MA June 6, 2012– August 31, 2012
<ul style="list-style-type: none">• 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), IIJA summer challenge (1st Place), Mayors Cup (3rd place), Varsity Hockey

Interests: Active Amateur Golfer (Index 4.2)