

[REDACTED]

EDUCATION

[REDACTED] [REDACTED]
Expected June 2027

- **Expected Relevant Coursework:** [REDACTED]
- **Expected Activities & Athletics:** [REDACTED]

[REDACTED] | GPA 3.87 / 4.0

- **Extracurricular Involvement:** Studied abroad at [REDACTED] University [REDACTED] via selectiv [REDACTED] program

WORK EXPERIENCE

[REDACTED] [REDACTED]
Wealth Management Winter Intern November 2023 – January 2024

- Collaborated with senior wealth managers to develop and manage financial plans and investment portfolios aligned with clients' risk tolerance and goals, utilizing financial tools i.e. Aladdin
- Helped structure and design tailored investment portfolios by analyzing financial data using Excel
- Conducted equities and sector research and analysis using tools such as Bloomberg terminal
- Prepared client analysis and diligence, financial models, and client deliverables within tight time constraints
- Participated in client calls, industry expert sessions, and meetings with fund managers on topics of prospective investments, market outlook, macroeconomic headwinds and tailwinds, and portfolio rebalancing
- Interned after an accelerated Fall semester (due to study abroad) and throughout break; received return offer

U.S. House of Representatives – [REDACTED] Washington, D.C.
Congressional Fall Intern August 2022 – December 2022

- Researched and compiled legislation and press briefings into draft memos to be reviewed by Rep. [REDACTED]
- Contributed to the research and writing of co-sponsor memos and various policy projects, often using Excel
- Authored 9 detailed reports summarizing financial services Congressional hearings and roundtable discussions

LEADERSHIP AND EXTRACURRICULAR ACTIVITIES

Trading System Developer and Portfolio Management [REDACTED]
Developer & Portfolio Manager October 2018 – Present

- Developed a proprietary trading system for small & mid-cap equities and ETFs, encompassing 126 statistically based criteria derived from thousands of data points
- Grew personal account from [REDACTED] during the utilization of this proprietary system
 - Outperformed benchmark by 750% since 2018 inception
- Successfully managed external funds, incorporating aforementioned trading system and conservative strategies; created various strategies and methodologies for differentiated types of risk appetite, performance goals, and sizing
 - Grew funds fro [REDACTED] and outperformed benchmark by [REDACTED]
- Awarded the [REDACTED] media interview by [REDACTED], a billion-dollar financial company, for trading achievements, discussing trading insights and economic theory with [REDACTED]
 - Across all modes of communication, the interview ha [REDACTED]
- Profiled in the [REDACTED] issue of [REDACTED], an award-winning finance magazine, for trading achievements

Founder & Policy and Research Consultant [REDACTED]
September 2021 – Present

- Authored a 55-page policy paper and conducted in-depth research, analyzing crime, street lighting's effect on crime, and cost-benefit analyses of street lighting implementation on local economies
 - Delivered PowerPoint presentations to [REDACTED] commissioners, [REDACTED], and business leaders where I presented my research and persuaded stakeholders to support actionable measures
- Appointed by [REDACTED] Commission to the [REDACTED] this governmental committee of 7 evaluates [REDACTED] lighting infrastructure and delivers recommendations to commissioners

SKILLS, AND INTERESTS

[REDACTED]