

Name

E-mail:

Phone:

Professional Experience

ST. JOHN'S UNIVERSITY

Graduate Assistant, Sept 2012- Present

- Reviewed and updated annual financial statements for the Office of Business Affairs and assembled monthly reports that were presented to University Board Members
- Created tuition projections by benchmarking past and current tuition figures for 15 nearby and competing universities to forecast future tuition increases
- Developed a statistical model to predict student retention rates from a data set with over 12,000 students

LINCOLN FINANCIAL GROUP

Investments Intern, Feb 2012-April 2012

- Worked for a portfolio manager conducting mortgage-backed and asset-backed security analysis of seven competitors with a strong focus on financial statement analysis
- Completed a competitor review of alternative investment portfolios and helped determine what actions should be taken in LFG's portfolio regarding hedge fund and private equity investments

UBS FINANCIAL SERVICES

Financial Intern, Sept 2011-Dec 2011

- Assisted a Vice President service a client base while utilizing proprietary software to analyze exiting investment portfolios and develop various investment options using individual stocks, bonds, mutual funds, and ETF's
- Prepared financial plans for clients using information regarding client's current financial position and future goals
- Researched over 500 mutual funds using Morningstar software to calculate client's current financial position

OFFICE OF LEADERSHIP AND SERVICE LEARNING, UNC GREENSBORO

Undergraduate Assistant, Aug 2010-Aug 2011

- Conducted seminars to discuss leadership traits styles with college freshman
- Introduced new, creative ways for students to increase leadership potential through interactive presentations and strong class involvement

Education

ST. JOHN'S UNIVERSITY

Master of Business Administration

Anticipated Graduation Date- December 2013

GPA-3.83/4.0

UNIVERSITY OF NORTH CAROLINA AT GREENSBORO

Bachelor of Science in Finance, Minors in Spanish and Economics

GPA-3.55/4.0

Extracurricular Activities

FRATERNITY

President

- Increased membership by 86.6% in two semesters by promoting organization involvement and cohesiveness

MICROFINANCE CLUB OF NEW YORK

Member

Computer Skills

- Microsoft Office, Morningstar, FactSet, SPSS, Bloomberg Terminal (limited)