

**Name**  
Address  
E-mail Address  
Phone Number

## Education

**Non Target University** XXX  
*Candidate for Bachelor of Science Degree in Business Administration* XXX

- **Concentration(s):** Finance, Accounting
- **GPA:** 3.32 / 4.0
- **Relevant Coursework:** Financial Risk Management, Investments, Corporate Finance, Financial Reporting and Analysis

**Prestigious High School** XXX  
*High School Diploma* XXX

- **Honors:** National Honor Society, Honor Roll, Senior Leader

## Work Experience

**Boutique PWM** XXX  
*Associate* January 2013 – June 2013

- Performed various duties relating to different aspects of the business including investment research, client reporting and business development
- Gathered historical investment performance data in Excel, modeled the data, then updated in client performance reports
- Researched platform investment managers, detailed holdings reports and assisted updating due diligence documents
- Tracked and reported on all alternative investments, including aggregating data on capital calls and distributions
- Created client presentations and prospect pitch books
- Started business development campaign for over 100 university endowments which promoted the firm's brand
- Reformatted and reorganized the internal online file storage system, increasing efficiency

**Large Asset Management Firm** XXX  
*Trading Systems Business Analyst* January 2012 – June 2012

- As a member of the Front Office Support team, responsibilities included executing and delivering trade blotters and recaps to senior management, PMs and traders, and managing the broker commission system
- Lead analyst on a project to develop and implement automated trade recaps and blotters, which resulted in increased reporting efficiency, saving both money and time
- Reconciled trades between the Bloomberg trading platform, broker commission system and individual traders' books
- Wrote business requirement documents and ran test cases for the broker commission system

**Boutique Metals Merchant Firm** XXX  
*Summer Intern* May 2011 – August 2011

- Worked under a trader in a small office environment researching mining companies
- Exercised strong analytical skills when researching over 30 mining companies using Yahoo Finance, Bloomberg, 10-K reports and press releases
- Prepared specialized research reports for each mining company, detailing production status, financial standing and recent news

## Activities, Interests & Skills

- **Activities:** Finance & Investment Club, Executive Council of XXX fraternity, intramural soccer
- **Computer Skills:** Proficient in Microsoft Excel, Word and PowerPoint. Knowledgeable in Bloomberg and Sharepoint. Exposure to Microsoft Access
- **Interests:** Golf, Italian cooking, crossword puzzles, chess, baseball, football, travel