NAME

Phone ▪ Email ▪ Address

Education

CFA Institute
Level III Candidate ***June 2013***

Non-Target School **New York, NY**
Bachelor of Business Administration, Concentration in Finance, Minor in Economics *Graduated May 2009*
Cumulative GPA: 3.57

Work Experience

Custodial Bank **Boston, MA**
Business Analyst *February 2011-Present*

- Identify oversights in client contracts and identify new sources of revenue to support the diversification of clients' custody portfolios
- Partner with Relationship Management and Client Service Group to centralize data, fees and contract language surrounding new products
- Track performance measures, both internal processing efficiency and trends in client's asset portfolio volumes in order to develop and test new processes and procedures
- Reconcile underlying client portfolio components against the invoices to ensure accurate reporting of trade settlements and Fund Accounting assets
- Train employees from various department on the intricacies of the data management process due to the customization of financial products offered by the firm

Brokerage Firm **White Plains, NY**
Financial Representative *September 2009-January 2010*

- Contacted high net-worth individuals regarding their investment needs and suggested compelling stocks, bonds, and mutual funds
- Obtained Series 7 and Series 63 licensure while consistently outperforming daily sales quota of 5 qualified leads
- Created detailed Morningstar reports to recommend ideal portfolio allocations for existing clients
- Researched suitable investment opportunities for current and prospective clients

Advertising Agency **New York, NY**
Junior Financial Analyst *May 2008-August 2009*

- Developed financial models to create internal forecasting numbers, using several evaluation criteria including DCF, IRR, and Purchase Price Multiples
- Reported current events and news on the advertising industry to the Chief Financial Officer daily
- Reconciled data from the sales reporting system to the GL to ensure accurate financial reporting
- Monitored competitors using equity analyst reports, daily stock movements, and KPI's

Extracurricular Activities

Business Honors Society
Vice President *September 2007-May 2008*

- Oversaw the operations of the business honors society with over 50 active members
- Trained individuals to perform over 200 free tax returns as Site Coordinator for IRS-sponsored Volunteer Income Tax Assistance Program
- Created and taught a 4 week financial literacy course in collaboration with the Chinese Progressive Agency

Awards and Accreditation

Level III CFA Candidate *(2013)*, Omicron Delta Epsilon Economics Honors Society *(2009)*, Peer Leader *(2008)*, Business Honors Thesis Program *(2008-2009),* Volunteer Income Tax Assistance Certified *(2008-2009),* Business Honors Society Outstanding Candidate Award *(2007)*, Dean's List *(2007-2009)*, 2nd Degree Black Belt *(2006)*