

First Last Name

Phone: xxx-xxx-xxxx Email: xxxxxxxx@xxx.edu
Current Address: xxxx xxxxx xxxx xxxxxxxx,xx xxxxx

EDUCATION

Semi-Target State School

College of Business: Bachelor of Science in Finance
College of the Liberal Arts: Bachelor of Arts in Economics

City, State
Class of 2015
Cumulative GPA: 3.96
Major GPA: 4.00

EXPERIENCE AND LEADERSHIP

XXXXXX Wealth Management, LLC

Financial Planning Intern

XXXXXX, NY
May 2012 – Present

Key projects:

- Analyzed 18 different asset allocation models and formulated a system to set rebalancing tolerances for individual asset classes on a relative basis using Interactive Advisory Software
- Performed monthly rebalance reviews on clients' portfolios and formulated reports suggesting necessary trades
- Created Excel workbooks analyzing data and trends related to client revenues, prospective client tracking and client demographics
- Performed Monte Carlo Analyses on clients' portfolios to determine whether they were on track with their goals for retirement spending
- Migrated and redesigned firm's website to make it more visually appealing, improve functionality, and maximize exposure
- Reviewed and edited CFP's book entitled, "XXXXXXX" and formed blog posts and other publications from financial planning information contained in it
- Created an Excel workbook utilizing the Wealth Management Index to record and analyze new client progress in the comprehensive planning process

XXXXXX State University

Research Assistant

XXXXXX, XX
August 2011 – December 2011

- Organized and entered research data into Microsoft Access and Microsoft Excel for analysis

Sorority Name

Director of Alumnae Relations

XXXXXXXX, XX
December 2012 - Present

- Developed and directed a comprehensive communication plan for alumnae relations
- Developed new initiatives to improve and maintain alumnae participation within the chapter
- Planned and implemented alumnae events for local and chapter alumnae

HONORS

National Society of Collegiate Scholars, Member

Fall 2011 – Present

Dean's List, College name

Fall 2011 – Present

Top Academic Scholarship, High School name

August 2007 – May 2011

SKILLS

- Exceptional writing & analytical skills
- Extensive experience using Microsoft Excel and PowerPoint, Redtail CRM, Interactive Advisory Software, QuickBooks and MoneyGuidePro