

First Last Name

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

EDUCATION

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| Semi-Target State School <i>College of Business</i> : Bachelor of Science in Finance <i>College of the Liberal Arts</i> : Bachelor of Arts in Economics | City, State <i>Class of 2015</i> Cumulative GPA: 3.96 Major GPA: 4.00 |
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EXPERIENCE AND LEADERSHIP

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| XXXXXX Wealth Management, LLC <i>Financial Planning Intern</i> | Xxxxxx, NY May 2012 – Present |
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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

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| Xxxxxxx State University <i>Research Assistant</i> | Xxxxxxx, XX August 2011 – December 2011 |
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- Organized and entered research data into Microsoft Access and Microsoft Excel for analysis

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| Sorority Name <i>Director of Alumnae Relations</i> | Xxxxxxxx, XX December 2012 - Present |
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- 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

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| 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