

**EDUCATION:**

██████████ – **Wutang School of Business** **Class of 2012**  
*BS in Finance, Minor in Economics - GPA: 3.34/4.0; Major GPA: 3.6/4.0*

**Honors:** 2012 President Scholar, 2011 & 2012 SSC Athletic Commissioner’s Honor Roll, 2009 Pilgrim League All-Academic Team  
**Coursework:** Investments, Statistics, Financial Accounting, Intermediate Accounting, Macro-Theory, Strategy, Leadership  
**Publications:** “Is the U.S. a Vehicle Headed toward a Fiscal Bump, Hill or Cliff?”; “Restructuring the Debt of Developing Countries: Will Yesterday’s Debt Management Methods Suffice in Today’s Turbulent Markets?” (See my LinkedIn Profile)  
**CFA Level I Candidate:** December 2013

**EXPERIENCE:**

**Don’t Pollute – United States** **Sep 2012 – Dec 2012**

**Marketplace Analysis Intern – Renewable Energy Startup**

- É Instructed users on setting up or searching auctions and analyzing marketplace trends
- É Researched and analyzed global market for renewable petroleum products, specifically motor and cooking oil
- É Accompanied senior co-founder on multiple seed stage financing meetings with Orlando, FL based investors

**Bulge Bracket PWM – United States** **Apr 2012 – Dec 2012**

**Junior Analyst – Wealth Management**

- É Conducted market research for private wealth team managing over \$400 million in assets
- É Analyzed individual and fund investments in equity and fixed-income for portfolio reallocation
- É Prepared multiple-scenario investment menus with UBS Core Equities and different fund exposures
- É Depicted variations of portfolio allocations in detailed reports through Morningstar
- É Presented data and discussed with investment associates, advisors and portfolio manager
- É Automated and organized the search functions within client and prospect databases and in MS Excel
- É Increased team efficiency and fostered specialization and focus of roles through diversity of efforts

**Business Brokerage Firm – Lakeland, FL** **Apr 2011 – Jul 2011**

**Business Development Intern – Business Sales**

- É Aggregated client contact and financial information in MS Excel databases for valuations and listing profiles
- É Generated a Pro-Forma Income Statement forecast for a chain of consolidated Coin Laundry businesses
- É Projected future revenue using previous 5 year sales trends and percentage of sales for operating & capital expenditures
- É Marketing and cold call prospecting led to a 30% increase in prospect inquiries and scheduled meetings for managing broker

**PROJECTS:**

**Dick’s Sporting Goods Competitive Analysis** **Summer 2012**

- É Extracted financial figures and information using SEC 10K and 10Q filings from EDGAR
- É Researched and analyzed competitive environment in the sporting goods specialty retail industry

**Regression Analysis** **Dec 2012**

- É Hypothesized a positive relationship existed between Home Depot’s equity market value and housing market data
- É Concluded that independent variables were more likely to be leading or lagging indicators than coincident predictors

**LEADERSHIP:**

**Ulman Cancer Fund for Young Adults** **Nov 2012 – Aug 2013**

**Leg Leader – 4k for Cancer Program**

- É Led 26 cyclists 4300 miles across the U.S. to raise money and awareness for cancer support services
- É Individually raised \$5,000 to contribute to the \$800,000 the program raised collectively

**NCAA Division II Lacrosse** **Jan 2010 – May 2012**

**Team Captain, Scholarship Athlete – ██████████**

- É Motivated a team of 60 to establish, pursue and achieve team and individual goals on a constant basis
- É Twice garnered 1<sup>st</sup> team All-Conference, MVP and All-America Nomination honors

**NCAA DIVISION III Football & Lacrosse – ██████████** **Fall 2008 – Spring 2009**

- É Balanced maintaining a 3.5 GPA while contributing to the success of two varsity athletic programs at Springfield College

**SKILLS:** Financial Analysis, MS Office, Learning MS Excel VBA & Financial Modeling, Morningstar, Bloomberg Beginner

**ACTIVITIES:** Cycling, Triathlons, Mock Investing, Sports Leagues/Pick-Up Games, Reading

**INTERESTS:** Psychology of Motivation, Exercise Sciences, Wellness & Nutrition, Investing, Competitive Strategy