

## EDUCATION

---

*Bachelor of Business in Economics & Finance*

**Chicago, IL**  
Expected May 2018

**GPA:** 3.86 / 4.00

**Honors:** Dean's List, Highly esteemed Honor Society

**Relevant Coursework:** Corporate Finance / Financial Accounting / Intermediate Economic Theory / Monetary & Fiscal Policy / Financial Statement Analysis / Econometrics

### **Universitat Pompeu Fabra: Economics & Business School**

*Semester Abroad Program*

January-May 2016

**Relevant Coursework:** International Economics / Intercultural Business Ethics / Spanish History

## WORK & LEADERSHIP EXPERIENCE

---

### **Independent Broker/Dealer LLC**

*Financial and Accounting Analyst*

May 2015-Aug 2016

- Prepared detailed manager of manager reports for multiple high net-worth clients on asset allocation, targets, cash flows, weighted performance, and other issues using text, excel formulas, graphs, and VBA macros
- Researched, gathered and analyzed company specific data used to estimate valuation targets and earnings estimates for approximately 20 companies across all economic sectors; timely communicated data so CIO can utilize it to make informed investment decisions
- Developed, utilized and maintained standardized analytical reports, tested the validity of these and forecasts by keeping a running track of buys, sells and other suggestions and their ultimate success or failure; analyzing the reasons and constantly improving the process
- Performed reconciliations of the custodial statements and portfolio management system: troubleshooting dividends, accruals, pricing and other issues; generated complex client reports

*Intern/Analyst*

May 2013-August 2014

- Responsible for preparing monthly asset performance reports for multiple high net-worth accounts
- Monitored and reported earnings quarterly on 5-10 companies owned across multiple portfolios
- Supported human resources personnel with the vetting, interviewing, and selecting of potential intern candidates
- Updated and prepared the firm's quarterly economic chart book

*Assistant*

May 2011-May 2013

- Learned all facets of firm from interning as secretary and tending to clients to processing payroll and managing work shifts
- Serviced assigned clients via telephone and in meetings

### **Broadview Road Cleanup**

**Project**

*Cofounder*

June 2012-Present

- Picked up litter, recycled plastics and metals found on road and fostered an awareness for recycling and trash pickup in the community through leading over 25 road cleanups
- Identified opportunity to extend program to residents of nearby health center (assisted living facility) in order to increase awareness and efficiency through formal organization of events

## SKILLS, ACTIVITIES & INTERESTS

---

**Languages:** Business Proficient in written and spoken Spanish (7+ years)

**Technical Skills:** Wall Street Prep Certified in Financial Statement, LBO, M&A valuation & analysis

**Certifications & Training:** University Banking Club, University Investment Fund

**Activities:** Basketball, Coaching, Investing, Tutor, Sigma Alpha Epsilon

**Interests:** Environmental issues, photography, writing, traveling, food & wine

