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## **EDUCATION**

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*Bachelor of Arts in Business Administration, Concentration: Finance*  
GPA: **3.6**

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June 2020

- Foster Microsoft Excel Credential (Completed Dec 2018)

**University College London Exchange**  
*Incoming Study abroad Student*

**London, UK**  
September 2019-December 2019

**Community College**

*Associates in Integrated Studies: focus in business*

GPA: **3.74**      Presidents honors: **2 out of 7 quarters**

XXXXX  
August 2018  
Faculty honors: **4 out of 7 quarters**

## **WORK EXPERIENCE**

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**Empirical Wealth Management**

*Associate Finance Advisor Intern*

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May 2019-Present

- Prepared meetings with advisors and clients by making sure their AA was in balance, beneficiaries were assigned to their IRA accounts, reminded the advisor of important information on the client, etc
- Helped the PM team create a more efficient and less cluttered securities model
- Helped with administrative tasks: answered the phones, greeted clients in the lobby, built sales brochures, etc

**XXXXXX Roof Cleaning**

*Founder/Owner*

XXXXXXX  
June 2015-September 2018

- Six figures sales within the first two years
- Joined the RCIA (Roof Cleaning Institute of America) national community to collaborate about the industry
- Created value in my community and built a positive reputation

**Bank of America**

*Teller*

XXXXXXXXXXXX  
December 2014-May 2015

- Established strong personal relationships with clients, and assisted them with their needed transactions
- Oversaw ATM balances, refilled cash as needed, and ensure the system was in good working order
- Handled foreign currency and exchange transactions
- Strictly complied with the banks internal control policies

## **PROJECTS**

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*MGMT 445 – Multicultural Consulting Project*

March 2019

- Developed skills to identify client's business needs: problem identification, diagnostics, and success factors
- Compared the company's financial records to industry averages, obtained from the school's extensive data base
- Formatted realistic recommendations, and effectively communicated them to the business client

*Deloitte Case Competition Semi-Finalist*

April 2019

- Recommended to launch (pilot approach) a mobile payment software system to Houton Mart's global stores
- Used a decision matrix to choose add-ons for the software
- judges (a group of 8 people compiled of Deloitte consultants and professors) noticed and elaborated on our deep collaboration between our four group members

## **ADDITIONAL INFORMATION**

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**Language:** American Sign Language (conversant)

**Skills:** Microsoft Office (Excel, Word, PowerPoint), Financial Modeling (completed Training the Street)

**Interests:** International Travel (been to 15 countries), Classical Music, Chess, Sports