

Manny the Monkey

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EDUCATION

University of California-Santa Barbara

Bachelor of Arts in Economics

Santa Barbara, California

Expected Graduation Spring 2017

- **GPA:** 3.3 / 4.0
- **Relevant Coursework:** Financial Statement Analysis, Managerial and Financial Accounting
- **Extracurricular:** Alpha Tau, Finance Connection

WORK & LEADERSHIP EXPERIENCE

UBS-Private Wealth Management

Portfolio Management Intern

Walnut Creek, California

June 2015-Present

- Intern for the Golden Gate Group, an institutional consulting and private wealth management team with \$3 billion AUM
- Joined the Managing Director in meetings, advising clients and institutions on how to manage and expand their wealth
- Daily tasks include using Bloomberg, creating supporting analytics using excel, as well as assist by creating extensive performance reports for clients

Alpha Tau Omega Fraternity

Treasurer

Santa Barbara, California

January 2015-Present

- Created the first comprehensive budget, with total revenue exceeding \$150,000 yearly
- Increased collection rates of dues to 92% from 80% while putting into place a financial contract to help ensure financial stability into the future
- Serve on 9 person Chapter Executive Team whose responsibility is to ensure organization's goals are achieved

Philanthropy Chair

December 2013 – January 2015

- In charge of 135 members' community service hours, creating multiple events for members to attend
- Coordinated with community, university, and national representatives to make sure all requirements were met
- Co-Directed a three-day event for local non-profit with over 700 people in attendance and raised over \$7,500

RELEVANT CLUBS, AWARDS & INTERESTS

Finance Connection

Member

Santa Barbara, California

October 2014-Present

- Acquire knowledge of the finance industry through attending weekly meetings, workshops, guest speakers, and presentations
- Attend monthly panels that present alumni and local representatives to learn about career paths across the financial services industry

PricewaterhouseCoopers LLP

Tax Challenge

October 2014

- Placed 3rd among 30 UCSB teams in PricewaterhouseCoopers' annual competition
- Case competition on international virtual currency
- 12-minute presentation and 2 page report with multiple solutions and team recommendation

Skills: Financial Modeling (Wall Street Prep Course), Microsoft Office, Bloomberg Proficient

Interests: Swimming (All-American: 2013), surfing, golfing, beating my father in anything