

Name

13 Address Dr. | City, State 12345

Phone # | email

EDUCATION

Non-Target

Bachelors of Science in Business Administration, Concentration Financial Analysis

City, State
Expected June 2015

- **Concentration GPA:** 3.7 / 4.0, Cumulative 3.3 / 4.0
- **Honors:** Dean's List, Member of National Society of Collegiate Scholars, University of Chicago Legacy
- **Relevant Coursework:** Calculus, Accounting I-II, Business Law, Applied Economics, Financial Derivatives, Statistics
- **Technical Skills:** Data analysis, financial modeling, competitive analysis modeling, SQL, Microsoft PowerPoint, Excel and Access
- **Certifications:** Bloomberg Fixed Income Essentials, Bloomberg Core Essentials

PROFESSIONAL EXPERIENCE

Major Mortgage Lender (non-bank)

Capital Markets Summer Analyst

City, State
May 2014—Aug 2014

- Analyzed revenue margins, loan fallout risk, and outstanding mortgage backed security issuance within the capital markets division
- Selected Project Experience:
 - Led a project to build an SQL database containing financial models that compared issuance volume of mortgage backed securities between major competitors; report will be distributed monthly to senior directors and vice presidents for market share analysis
 - Organized meetings for an internal consulting project which sought to aggregate previously separate data warehouses, resulting in an estimated \$80MM increase in revenue
 - Administered two daily reports to 30 team members which illustrated aging status of loans currently undergoing investigation
- Became familiar with pricing, trading, and hedging of mortgage backed securities and their markets
- Extracted data using a Bloomberg Terminal to examine trends of fixed-income securities and interest rates
- Used Excel functions including VLookups, IF Statements, and Pivot Tables to create precise and sustainable reports

National Brokerage

Branch Intern

City, State
Aug 2013—May 2014

- Worked with clients to aid in research and valuation of equity, derivative and fixed-income based investments for their portfolios
- Achieved significant increase of client assets under management utilizing a new corporate asset gathering initiative
- Derived data from SEC filings and news reports for financial models to provide equity valuation reports for clients
- Maintained branch client satisfaction score above 95% for 2013

NHL Team

Summer Financial Analyst

City, State
May 2013—Aug 2013

- Facilitated daily operations of the finance department by collecting, reconciling and consolidating historical financial statements
- Collected historical insurance pricing data and built a model which forecasted future costs of insurance premiums based on various risk factors such as player injury history and potential roster adjustments
- Participated in team's preparation for tax filings by gathering and organizing expense records and invoices

Major Retailer

Connected Business Group Sales Consultant

City, State
Jul 2012—Aug 2013

- Delivered complete technology solutions to customers including personal computers, cellular devices, and tablets
- Developed a strategy which increased margins per transaction by 8%, improving the store's rank into the top 10% of the company
- Exceeded monthly sales goals and attachment rates by an average of 16%

LEADERSHIP EXPERIENCE

School's Investment Fund

President

City, State
Aug 2013—Present

- Co-founded newly formed xxxxx Investment Fund, a mock mutual fund ran by students and alumni seeking to gain experience in a simulated institutional investing environment
- Led a team of analysts in valuing equity and derivative securities by using DCF, competitive analysis, and binomial pricing models
- Gave a weekly presentation on upcoming economic events and their impact on fixed-income and equity markets

School's Undergraduate Consulting Club

Vice President

City, State
Aug 2014—Present

- Placed first in the club's major case competition after presenting a strategic plan for the international expansion of Target Corporation
- Competed in the Wharton School Undergraduate Case Competition in Philadelphia against teams from schools across the world
- Led team of four on weekly case competitions against other members of the club as well as other schools in the area
- Refined consulting skills and practices such as business strategy analysis and data modeling through case studies and alumni guidance