

## NAME

600 West Walnut Street ▪ Danville, KY 40422  
(859) 000-0000 ▪ name@gmail.com

### SUMMARY OF QUALIFICATIONS:

- Experience with investments
- A talent for connecting with others and a team player with a high level of responsiveness
- Strong computer skills: excellent working knowledge of Microsoft Office and STATA
- Ability to handle clients and meet their financial needs in a professional manner

### RELEVANT EXPERIENCE:

#### **Research Assistant**

Summer 2013 and Spring 2014

*Raymond James and Associates*

Tampa, Florida

*Farmers National Bank Investments Group*

Danville, Kentucky

- Worked as a paid intern with Mustard Seed Advisors, a retail team with Raymond James and Associates, over the summer.
- Worked as an unpaid intern for Farmers National Bank Investments Group during the following spring.
- Performed investment research for the different advisors on the team.
- Responsible for researching, maintaining, and changing the mutual fund portfolio used by team.
- Worked with the investment head to generate new ideas for securities to be pitched to the clients.
- Updated and contributed to the "Best Picks" list of equities used by the advisors.
- Spoke with and handled client needs and concerns that did not require licensing.
- Developed self-updating stock lists and portfolios for certain clients via Excel and MarketQ.

#### **Server/Busser**

December 2009-July 2010, Summer 2011, and Summer 2012

*Carrabba's Italian Grill*

Tampa, Florida

- Promoted to server in February 2010.
- Received, processed, and delivered food and drink orders.
- Handled customer concerns and supported managers and other servers in any way needed.
- Prepared the restaurant for the following day.
- Worked special events when asked.

#### **Host/Busser**

July 2008-July 2009

*City's Deli and Marketplace*

Tampa, Florida

- Greeted and seated the customers and handled customer concerns.
- Supported the servers and cooks as needed.
- Restocked menus and silverware and set up tables for new customers.

### LEADERSHIP EXPERIENCE:

#### **Co-Founder and Co-Director**

Fall 2012-Spring 2014

*Centre Investment Society, Centre College*

Danville, Kentucky

- Started the investment society with another student.
- Obtained \$100,000 from the college's endowment with which to invest.
- Held bi-monthly executive council meetings and monthly general session meetings to oversee current investments and pitch new ideas.
- Actively recruited new student members.

#### **Sophomore Rush Chair**

Spring 2011

*Pi Kappa Phi, Washington and Lee University*

Lexington, Virginia

- Responsible for organizing and running events to recruit new members.
- Met and advised prospective new members about the joining process and regulations.

### EDUCATION:

**Centre College**, Danville, Kentucky

Expected Graduation: May 2014

Current student working towards a Bachelor of Science in Financial Economics

**International Study:** Shanghai, China, Fall 2011

**Honors:** Member of Phi Beta Kappa