

EDUCATION: EDUCATION: TEMPLE UNIVERSITY, Fox School of Business, Philadelphia, PA
Bachelor of Business Administration, Graduation: May 2015
MAJOR: Finance | MINOR: Economics
GPA: 3.41 | Dean's List, Fall 2011, Fall 2012

ACTIVITIES & AWARDS:

Volunteer, Steve Stefani Dance Marathon, Fall 2008-Present
Volunteer, Philadelphia Urban Educators, Fall 2012-Spring 2013
Member, Financial Management Association, Fall 2012-Present
Recipient, Temple University Academic Scholarship, Fall 2011-Present
Professional Athlete, Kronum League, Summer 2012-Present

EXPERIENCE: LINCOLN FINANCIAL ADVISORS, Cherry Hill, NJ August 2013 – December 2013

Financial Planning Assistant

- Research and present mutual funds using Morningstar software to current and perspective clients
- Assemble presentations for clients outlining different insurance and alternative investments opportunities
- Implement financial planning strategies to create portfolios for clients of high net worth
- Analyze and evaluate client's portfolio in terms of risk, return, and return versus a benchmark
- Research and contact up to five perspective clients weekly obtaining up to three for new business

WILLIAM DUNKLEBURG'S OWL FUND, PHILADELPHIA, PA

Lead Analyst of Industrial/Basic Materials Sector

January 2013- Present

- Prepare stock pitches including initiating coverage reports by conducting market research, financial analysis, and relative valuation on companies in assigned sector to capitalize on undervalued companies
- Write reports and create presentations by using Bloomberg, Capital IQ, Thomson One, and other industry research tools to perform equity research and search for undervalued companies
- Create forecasts, linear regression simulations, relative valuation tables, and discounted cash flows models using excel to support research in initiating coverage reports and to generate 52 week price targets

FASTENERS SYSTEMS INC, West Goshen, PA

June 2009 - Present

Head of Shipping and Receiving

- Shipped and received up to 500 materials daily to fulfill orders for the distribution of roofing supplies
- Trained 2 people annually on policies, operations, procedures, and equipment of the company
- Created a new system for inventory to accommodate materials being received and shipped, resulting in easier access to popular items needing to be gathered for shipping
- Started as an Inventory Calculator, promoted to Assistant of Shipping and Receiving, and finally promoted to Head of Shipping and Receiving

SKILLS:

- **Microsoft Office:** Word, PowerPoint, Excel, Outlook
- Bloomberg Terminal: Equity Essential, Fixed Income, API Certification
- Capital IQ
- Thomson One
- Fork Lift Certified