

EDUCATION: TEMPLE UNIVERSITY, Fox School of Business, Philadelphia, PA

Bachelor of Business Administration, Graduation: May 2018 Major: Finance and Management Information Systems

GPA: 3.84 | Business Honors Program | University Honors Program Dean's List, Fall 2014 - Spring 2017

ACTIVITIES AND AWARDS:

- Temple University Presidential Scholarship Recipient
- Fox BHSA Member (September 2014 - May 2015)
- Temple University Investments Association Member (September 2015 - Present)
- Association for Information Systems (January 2016 - Present)
- William C. Dunkelberg Owl Fund (January 2017 - Present)

EXPERIENCE:

Bank of America Merrill Lynch, Wayne, PA (May 2017 - Present)

Financial Advisor Intern

- Work with the Suburban Philadelphia Market Executive to create weekly reports and assess Financial Advisors' performance relative to the benchmarks set by both Merrill Lynch and the Suburban Philadelphia Market.
- Monitor clients' brokerage accounts to ensure that the accounts are properly aligned with the firm's Allocation Profiles.
- Assist Financial Advisors in updating client accounts when Options, High Yield Debt, and IPO forms expire.

Temple University Fox School of Business, Philadelphia, PA (January 2017 – May 2017)

Peer Teacher

- Assisted students in learning course material for MIS 2501 Enterprise IT Architecture by holding office hours and organizing review sessions to reinforce lessons and concepts taught in the class.
- Lectured the class on IT Architecture topics including virtualization, cloud computing, and networking.
- Collaborated with the class professor to create exams and assess students' understanding of the coursework.

SKILLS and LANGUAGES:

Proficient in:

- MS Word, Excel, and PowerPoint