

PREP YOUR PATH RESUME

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PROFILE

College senior with a Bachelor of Science in Business Administration expected May 2021 and a Master of Finance expected June 2022 seeks a financial services internship for Summer 2021 in the Dallas, TX area. Accounting experience working in the family office of the founder of one of the world's largest asset management firms. Proven ability to achieve goals efficiently and effectively by managing people, processes, and technology. Interest in financial strategies and international business.

Core Skills, Competencies, and Knowledge

Financial Researching, Planning, Analysis, Budgeting, Forecasting, Monitoring, and Reporting; Financial Strategy; Accounting; Account and Operations Management; Data Analysis; Data and Spreadsheet Management; Financial Modeling; M&A Transactions; Portfolio and Fund Analysis; Valuation; Transactions Management; Client Service; Presentations; Leadership; Teamwork; Written and Verbal Communication; Organization; Time Management; Attention to Detail; FastPath; Intacct; Concur; Appian; Microsoft Word, PowerPoint, Excel, and 365; Google Drive

EDUCATION

Southern Methodist University, Cox School of Business, Dallas, TX Aug 2021 – May 2022
Master of Science in Finance; expected

University of Southern California, Marshall School of Business, Los Angeles, CA Aug 2018 – May 2021

Southern Methodist University, Cox School of Business, Dallas, TX Aug 2017 – May 2018
Bachelor of Science in Business Administration; Concentration in Finance; Minor in Classics (including Latin)
Combined GPA: 3.34; courses include: International Trade Finance and Commercial Policy; Business Communications; Mergers, Acquisitions, and Restructuring; Financial and Managerial Accounting; Business Calculus; Business Statistics; Internal Reporting Issues; Introduction to Tax Issues; Microeconomics; Macroeconomics; Advanced Latin

London School of Economics, London, England Jun 2018 – July 2018
Course: Principles of Accounting; learned basic concepts, methods, and practices from the European perspective

FINANCIAL EXPERIENCE

Dalio Family Office, Accounting Intern, Westport, CT Summers 2017, 2018, 2019

Met the mission and wealth strategy goals of the family of Ray Dalio, who has personal assets of \$18.7 billion and is the founder and co-chairman of Bridgewater Associates, one of the world's largest privately held asset management firms.

- *Account Management:* Maintained reports for the office of 200+ people, family properties, and philanthropic endeavors
- *Planning/Budgeting:* Controlled spending by overseeing expenses for the office and family properties
- *Analysis/Financial Modeling:* Ensured asset management effectiveness using Excel modeling and Excel spreadsheets
- *Research/Technology:* Improved financial tracking effectiveness and mitigated risk by introducing FastPath software
- *Forecasting/Reporting:* Documented or projected expenses efficiently by using Intacct software
- *Monitoring:* Tracked and clarified expenses efficiently by using Concur and Appian software
- *Program Development:* Optimized the internship experience by creating an annual training program for eight people

ADDITIONAL EXPERIENCE

Reece's Baking Addiction, Founder, Greenwich, CT May 2020 – Present

In lieu of a tax internship at International Flavors & Fragrances (IFF; revenues of \$5.1 billion) that was cancelled due to COVID-19, created and oversee an entrepreneurial business that serves the community by providing baked good products.

- *Operations Management:* Develop business skills related to product, planning, execution, sales, and customer service

Kappa Kappa Gamma, Vice President of Organization, House Manager, Los Angeles, CA Nov 2018 – Nov 2020

Promoted a sense of community and ensured the operational efficiency of a sorority by overseeing the master calendar and maintaining a 19,000 square foot residence that houses up to 67 members.

- *Operations Management:* Coordinated events, meetings, housing, staff, security, and reporting to national headquarters

ADDITIONAL INFORMATION: Born in London, England; raised in the New York, NY, Houston, TX, and Orange County, CA areas; graduated high school from The Taft School, Watertown, CT (2017); enjoy U.S. and international travel, including England, France, Belgium, Netherlands, Mexico, The Bahamas, and Canada
Date: January 2021