

NAME

+1 (312) 000-0000 | email@email.com | [linkedin.com-profile link](#) | City, STATE ZIPCODE

EDUCATION

Loyola University Chicago – Quinlan School of Business

Bachelor of Science in Finance | Major GPA: 4.00/4.00

Relevant Coursework: Advanced Investment Management; Applied Equity Investment Management; Financial Modeling

Chicago, IL

8/2022 – 5/2026

PROFESSIONAL EXPERIENCE

Wealth Advisors

Chicago, IL

Equity Research & Operations Intern

5/2024 – 7/2024

- Performed detailed equity analysis by reviewing earnings reports, financial statements, and market trends, while engaging with company management to gather insights, leading to 5 new investment recommendations
- Utilized YCharts to generate comprehensive financial reports, conducted portfolio analysis by tracking performance metrics, asset allocations, and risk factors leading to a 10% improvement in overall reporting efficiency
- Collaborated with the marketing team to develop engaging client presentations, conducted in-depth research on new business opportunities, and provided actionable insights that contributed to a 15% increase in client inquiries

Big Name Firm

Chicago, IL

Investment Operations Analyst

7/2023 – 5/2024

- Managed high-volume transaction flow by reconciling 1,000+ weekly revenue entries and inventory cost inputs; identified operational inefficiencies that improved margin visibility and reduced waste-related expenses by 10%.
- Built a dynamic Excel-based inventory forecasting model using historical demand trends and turnover ratios; optimized procurement timing and reduced excess holding costs while maintaining service-level targets above 98%.
- Led onboarding and training for 5+ new team members on process controls, compliance standards, and workflow efficiency; standardized procedures that increased throughput capacity by 15% during peak demand cycles.

Chipotle Mexican Grill

Chicago, IL

Crew Member

5/2023 – 7/2023

- Managed customer service during peak hours, processing 1,000+ orders weekly while ensuring safety compliance
- Monitored inventory levels and prepared ingredients, leading to a 10% reduction in food waste
- Trained new employees in customer service protocols, operational procedures, and efficient food preparation techniques, resulting in enhanced collaboration, improved workflow efficiency, and a 15% increase in customer satisfaction ratings

ACTIVITIES & LEADERSHIP

Student Government Association – Chicago, IL

Treasurer

8/2023-

Present

- Managed a \$30,000 budget for initiatives, ensuring funds were allocated to benefit a diverse range of student activities
- Implemented a new financial tracking system that streamlined the budgeting process, enhanced transparency, and allowed for better resource distribution, resulting in a 20% increase in student participation in campus events
- Worked closely with university administration to secure additional funding for mental health initiatives, expanding counseling services and wellness programs, which enhanced student support services across campus

Alpha Phi Omega (National Service Fraternity) – Chicago, IL

Service Chair

8/2023-

Present

- Led the planning and execution of 10+ community service projects, benefiting local shelters, food banks, and environmental initiatives, with participation from over 50 fraternity members
- Coordinated volunteer efforts with local nonprofits, ensuring projects were completed on time and exceeded expectations, which boosted the fraternity's recognition and strengthened relationships with community partners
- Increased member engagement by developing a reward system for participation, leading to a 40% rise in volunteer hours

Skills: Microsoft Office Suite (Excel, PowerPoint, Word) | Bloomberg Terminal | Excel | FactSet | Python | Tableau

Languages: English (Fluent) | Spanish (Limited Working Proficiency)

Interests: High-altitude hiking (Mount Whitney, Glacier National Park) | Jazz piano performance (8 years, Chicago Jazz Festival) | AI and blockchain trends (attended MIT Technology Review Conference 2023) | Marathon training and CrossFit competitions