

SUMMARY

Fourth year finance student with experience in various fields
Michigan Technological University Varsity Football
Active member of APMP Team and Finance Club

EDUCATION

Michigan Technological University | Houghton, MI
BS Finance | GPA: 3.2

Expected May 2023

EXPERIENCE

Applied Portfolio Management |

Project: Develop an investment philosophy and strategy to implement with a portfolio. Used this strategy to manage a two-million dollar portfolio over the course of a year.

- Create buy reports for each asset bought
- Buy/sell assets/equities
- Create screens for buying or selling new equities/assets
- Present to a board and keep the clients updated on the current portfolio's wellbeing

PROJECT

Financial Planning Project |

Project: Go through a client's finance's and give them suggestions as a fiduciary. Look through their income statements and liabilities. Decide what is best to invest in for their current situation.

- Created an estate plan for a client
- Recommended investments (crypto, stocks, other business adventures)
- Devised a report of all current issues with their finances
- Created solutions for reducing debt and issues in the client's business

COMPUTER and TECHNICAL SKILLS

- MS Excel
- Mathematica
- MS Office
- Inventory Reporting Programs
- Database Software Experience

LEADERSHIP

Anthony Wayne Football Captain

Sep 2018 – 2019

- Lead a team of 120 people into 2 playoff championships
- Provided community service with the team for 4 years

CO-CURRICULAR INVOLVEMENT

**Michigan Tech Varsity Football
Finance Club**

Aug 2019 – 2022
Jan-May 2022

WORK HISTORY

Kaufman Engineered Systems | Waterville, OH
Assembly and Robotical Parts
May- Aug 2021/22

Project: Take inventory for the business in all of their warehouses. Report the quantity and value of the products/parts, use a privately designed computer software to figure out price and quantity of parts. Check in new parts that are coming into inventory

**Fedex Ground Package Handler
Lift Worker at Mont Ripley**

May – August 2021
Jan – April-2022

INTERESTS

Snowboarding | Snowmobiling | Hunting | Boating | Surfing