



Department of

FINANCE

WILBUR O. AND ANN POWERS
COLLEGE OF BUSINESS



FINANCE CLUB
RESUME BOOK
2023-2024

The Clemson University Finance Club Resume Book is produced by the Faculty Advisor of the Finance Club. For more information contact the Department of Finance at (864) 656-4950 or write: Department of Finance, 166 Burns Hall, Clemson University, Clemson, SC 29634.

Clemson University Finance Club Officers for 2023-2024

President: Grace Kellerman (Senior Class)
Vice-President: Grant Svenson (Junior Class)
Vice-President: Scott Symank (Junior Class)

Department and College Level Support:

Faculty Advisor, Finance Club:	John Alexander
Chair, Department of Finance:	Angela Morgan
Dean, College of Business:	Wendy York

The Finance Club extends a special thanks to those who assisted in preparing the Resume Book

John Alexander	Faculty Advisor, Finance Club
Laura Cobb	Administrative Coordinator, Finance Department
Hannah Elgin	Clemson Alumni 2016, Finance Club Consultant

Our Program is a Notch Above

Tough Requirements and Standards

We believe that a strong foundation in accounting and a rigorous grading policy helps insure the quality and integrity of the finance education at Clemson.

- Clemson Finance undergraduates take more accounting courses than students at other top business schools in the Southeast.
- In the Clemson Finance undergraduate program, it is still very difficult to get an A. Many schools give a larger proportion of A's than they did several years ago, and no longer give failing grades. Grade distributions within Finance have remained the same over time.

Financial Information/Trading Room

In the financial world today communication goes beyond writing, speaking and preparing presentations, it also involves a thorough understanding of electronic databases.

- Our students receive training on using sophisticated databases such as Bloomberg.

Clemson Student Investment Fund

Our Portfolio Management class manages an investment portfolio over \$350,000. Students are trained to use fundamental, technical, and quantitative analyses to select securities and build a diversified portfolio.

Financial Modeling Class

Our students model real world financial problems, such as proforma financial planning or capital budgeting, using Excel and numerous Internet data resources.

Wilbur O. and Ann Powers
COLLEGE OF BUSINESS

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LUIS ABRIL-DE NICOLA
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EDUCATION

CLEMSON UNIVERSITY

Expected May 2024

Bachelor of Science in Financial Management with Real Estate Concentration, Accounting Minor

LANGUAGES AND CITIZENSHIP

- First Language is Spanish. Fully fluent in both written and spoken, Second Language is English. Fully fluent in both written and spoken.
- United States, Mexico and Italy citizenship.

EXPERIENCE

EPRI

Miami, FL

Financial Planning and Analysis Student Employee

May 2023-May 2024

- Underwent Financial analyst training like a new full time hire during the 12 weeks in the summer
- Will work as Financial Analyst throughout the school year minimum 20 hours a week as the financial analyst for multiple departments within the operations side of the company.
- Did the Forecasting and budgeting for the companies international cost centers operations because of my international background. Created assumptions using previous years data
- Used SAP ERP system to run reports and information to analyze Fund Transfers and Purchase Orders (PO's)
- Used Excel and BOBJ Bi to create worksheets for analysis
- Used Planful and Spotlight for inputting data and creating templates.
- Did reclassifications of transactions withing the general ledger

RODEN USA

Miami, FL

President's Personal Assistant

NOV 2021-JAN 2022, JULY 2022-AUG 2022

- Responsibility of carrying out cash deals for clients purchasing automobiles and other vehicles for shipments.
- SAVED the company \$42,000 by recognizing incorrect journal entries posted to the General Ledger by the hired accounting company.
- Developed charts, graphs, models, and presentations help visualize data and information to present to clients.
- Negotiated deals with 14 clients to maximize commission.
- Negotiated 9 purchases on behalf of clients to maximize profitability.
- Ran warehouse. Managed staff and dealt with contractors used to help run shipments when president was absent

SELF-EMPLOYED

Charlotte, NC

Technology Resell Online Store

May 2022 – AUG 2022

- Purchased Inventory which included used and refurbished monitors, and audio equipment consisting of speakers and high-end headphones.
- This business generated \$11,850 in revenue
- Gained customers by using Facebook and google ads and hiring marketing students to make the business more marketable.

EXTRA-CURRICULAR

- Clemson Club soccer and Association for Latino Professionals in Finance and Accounting

SKILLS/CERTIFICATIONS

- Microsoft Dynamics 365 Fundamentals Enterprise Resource Planning Certification
- Microsoft Excel for Finance Certification from Career Principles
- Excel, SAP, BOBJ, Financial Planning, Budgeting, Forecasting, Investment Analysis, Accounting

Eric Alves

105 Sikes Hall | Clemson, SC 29634 | 856-298-3544 | Egalves@g.clemson.edu

EDUCATION

Clemson University | Bachelor of Science in Financial Management

May 2024

- **Emphasis:** Corporate Finance
- **Minor:** Accounting

GPA: 3.6/4.0

EXPERIENCE

Cahill Financial Group

June 2023 - August 2023

Private Equity Intern

Wall Street, New York

- Worked extensively on trading floor within the hedge fund, alongside buy-side analysts to engage prospective high-net-worth individuals to invest in our unicorn holding companies
- Conducted research to identify lucrative investment opportunities to best diversify clients' portfolios
- Evaluated market trends to best assess the pre-IPO sector

Cahill Capital, Inc

June 2022 - August 2022

Finance Intern

Wall Street, New York

- Worked alongside buy-side analysts to determine the appropriate valuation and financials of rising publicly traded stocks such as Voyager Space and SpaceX to maximize investment opportunities for high-net-worth investors
- Created a financial pitch deck to build revenue projections, company valuations, and projected financial forecasts
- Involved in the analysis of cost penalty payment reviews and forecasting for small business lien releases
- Shadowed an enrolled agent preparing compliance checks and filing individual tax returns using Intuit ProSeries

CAMPUS INVOLVEMENT

Investment Research Club

August 2022 - Present

Research Analyst

Clemson, SC

- Collaborated with a cohort of students analyzing publicly traded companies and their financial statements using predetermined financial metrics
- Developed PowerPoint presentations with data visualizations from Excel and Tableau to formulate investment decisions based on quantitative and qualitative analysis

Community for Undergraduate Business Students

August 2021 - Present

Executive Leadership Committee

Clemson, SC

- Planned various activities for over 100 freshmen at Clemson University to help them network with knowledgeable professionals from across numerous industries
- Elected to mentor a peer small group of 6 freshman students to discuss different careers and ambitions
- Attended social events, workshops, and completed 20+ hours of community service within the city of Clemson

PERSONAL AND ACADEMIC PROJECTS

Stock Portfolio Project

February 2023 – August 2023

Investment Analysis

Clemson, SC

- Created a high-risk portfolio comprised of small-cap stocks, including diversification in biotechnology, pharmaceutical, automotive parts, and research and development
- Focused on asset allocation, risk aversion, and security selection
- Consisted of an Executive Summary, Firm Decision, Portfolio Performance, and Conclusion

Capstone Project

June 2022 – August 2022

Cahill Capital, Inc

Wall Street, New York

- Surveyed 100+ respondents on Wall Street and the greater financial district area: population comprised of 4 different continents
- Discussed the shortcomings in the financial education of K-12, the importance of this knowledge, and the societal benefit if implemented in schools
- The entire project included an Executive Summary, Data and Analysis, and a Presentation to company executives

ADDITIONAL INFORMATION AND INTERESTS

- Phi Kappa Tau - Founding Father, Truist Emerging Leaders Certification

Emma Maria Amthor

(516) 659-7774 -- eamthor@g.clemson.edu

Team-oriented individual with a strong quantitative and qualitative background seeking a finance job

EDUCATION

Clemson University, College of Business **May 2024**
Bachelor of Science in Financial Management, Minor: Accounting, Emphasis: Corporate Finance

WORK EXPERIENCE

Silver Point Beach Club **Long Island, NY**
Payroll Assistant and Ocean Lifeguard Summer 2018-2023

- Handled all aspects of preparing over eighty employees' payments including entering payroll and creating detailed Excel documents outlining payroll for the company
- Tracked and processed employee wages based on their compensation agreements, hours worked, and taxes
- Administered first aid response to life-threatening situations and saved two lives

Qudos Technologies, Inc. **Long Island, NY**
Technology and Marketing Intern Summer 2022

- Enhanced the Qudos app through extensive research, daily virtual meetings, and weekly trial and error test runs in search of potential improvements
- Developed experience with Slack, Qudos' marketing database, assisted with marketing plan development
- Effectively collaborated with the company's IT staff from throughout the world, developed communication and time management skills in a professional setting

Wall Street South Investment Club **Clemson, SC**
Executive Board Member 2023-Present

- Guiding members in trading of securities and management of their investment portfolios
- Evaluate and analyze securities for their inclusion within a theoretical portfolio of \$100,000
- Organize and coordinate presentations for the club with various professionals in the Financial Sector

LEADERSHIP EXPERIENCE & EXTRACURRICULAR ACTIVITIES

Finance Club (Member) **2023-Present**
• This Clemson University program focuses to provide interactions between current finance majors and companies, and prepares students for successful careers in finance

Women in Business (Member) **2023-Present**
• Collaborate with other women professionals across various financial careers by networking, attending workshops, and attending guest speaker events

Alpha Chi Omega – Theta Lambda Chapter (Member) **2020-Present**
• Participated in a leadership position in our annual philanthropic event, *Walk a Mile*. Collaborated with other organizations, and raised \$4,000 in 10 days for Safe Harbor

- Miss Alpha Chi Omega First Friday Representative
- Recruitment leader, supporting role for character building

Foothills Area YMCA (Nonprofit Organization) **Spring 2022**
• Volunteered 20 hours of community service at Foothills Area YMCA, Seneca, South Carolina

- Assisted members by addressing any questions or concerns regarding workout devices, helped organize additional paperwork, as well as wiped down machinery after use for sanitation purposes

SKILLS

Bloomberg Terminal, Microsoft Office Suite (Excel, PowerPoint, Word), Social Media Marketing (Slack, Instagram), Accounting, Interpersonal Communication, Attentiveness

AWARDS

Dean's List **Spring 2021, Fall 2021, Spring 2022**
National Society of Collegiate Scholars **2021- Present**
Long Island Herald Journalism Award **2020**

Caitlin Antonio

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Education

CLEMSON UNIVERSITY, COLLEGE OF BUSINESS

Bachelor of Science in Financial Management

Minor: Accounting, Emphasis: Corporate Finance

CLEMSON, SC

August 2024

Work Experience

READY SET GO PRIVATE TUTORING

Coordinator

- Dealt with bookkeeping of the business, kept records of each student who attended, rearranged session dates and times, as well as fees and extra costs in spreadsheet format.
- Private tutored high school students with SAT and ACT prep as well as editing and proofreading papers for their classes.

MIDDLETOWN, NJ

Summer 2023

CLEMSON UNIVERSITY ATHLETICS

Clemson Athletics Academic Tutor

- Tutoring Micro and Macro Economics to Student Athletes in the Clemson University Athletic Department for Undergraduates.
- An hour session helping and prepping the athletes understand knowledge and information on Economic classes taken at Clemson.

CLEMSON, SC

January 2023- Present

PROMENADE BEACH CLUB

Certified Beach and Pool Guard

- Head lifeguard manager at a private beach club in Long Branch, NJ. Duties included explaining and enforcing rules, regulations, and policies to ensure safety of club members.
- Monitored designated areas to recognize signs of danger, warning swimmers regarding unsafe situations, open and close pools, contributing to maintenance and upkeep of pools, and providing first aid and emergency care when needed.

LONG BRANCH, NJ

May 2019- August 2021

Leadership Experience

SUMMER SCHOLARS PROGRAM

Mentor and Counselor

- Worked as a mentor and counselor at the Summer Scholars Program at Clemson University for an eight-week program for middle and high school students interested in Clemson academics and campus life
- Responsibilities included a full day of walking students to and from buildings around campus, engaging in learning activities, and supervising students in their specific learning camps.

CLEMSON, SC

Summer 2022

Activities and Interests

Activities: Finance Club, Stock Pitch Challenge Team, Clemson Honors College, Sigma Kappa Sorority

Interests: Swimming, Photography.

Ronit (Ronnie) Badlani

Naples, FL 34114 · 973.970.5668 · Ronnie.Badlani@gmail.com

Objective:

Highly motivated Financial Management student seeking entry level opportunities to apply my skills in banking and investments, and contribute to organizational growth. I provide strong analytical skills, effective communication, and a passion for financial analysis.

EDUCATION

Clemson University | Clemson, South Carolina

May 2024

Bachelor of Science in Financial Management, Emphasis in Banking and Investments, Minor in Accounting

Honors: Dean's List | GPA: 3.3 (on a 4.0 scale)

Coursework: Principle of Microeconomics, Principle of Macroeconomics, Financial Management, Management with Personal Computer apps, Financial Accounting Concepts, Intermediate Financial Accounting, Personal Finance, Cost Accounting, Real Estate Finance, Investment Analysis

SKILLS

Technical: Microsoft Office Suite

Soft Skills: Communication, Leadership, Emotional Intelligence, Project Management, Customer Service

WORK EXPERIENCE

Sigma Alpha Epsilon Executive Board | Eminent Treasurer

November 2021 - Present

- Create budgets for the fraternity and allocate for various activities
- Collect and manage a budget of \$100K+ for the fraternity per semester
- Ensure responsible chairs stay within budget
- Handle tax preparation and filing

CVS Pharmacy | Cashier | Chester, NJ

November 2019-March 2020

- Managed point of sale and provided excellent customer service
- Maintained inventory and restocked shelves during peak hours
- Ensured accurate cash handling during register opening and closing

SRB Kicks | Entrepreneur | Chester, NJ

July 2018 – December 2021

- Launched a sneaker reselling business to increase income and learn basic business operations
- Utilized Excel to organize financials and to track profits and losses in order to maintain a budget
- Engaged with customers in a sincere and friendly manner and built relationships with customers to increase likelihood of repeat business, while recommending sneakers to buyers based off of needs and preferences

Collector Items For Sale | Entrepreneur | Chester, NJ

Summer 2017

- Established and operated a reselling business for collectibles, demonstrating negotiation and persuasion skills
- Earned a reputation for reliability and trustworthiness
- Achieved more than 30 sales totaling over \$2000 during the summer

Activities

Clemson University | Investment Research Club

January 2021 – Present

- Analyzed stocks and ETFs looking for strengths and weaknesses
- Created presentations comparing stocks to evaluate their investment potential
- Collaborate with members to improve research methods

Sigma Alpha Epsilon | Marketing Chair

August 2021 - December 2021

- Promote fraternity events through strategic marketing efforts
- Managed the sales of products promoted by the fraternity

Ashlyn Ballew

ashlynballew8282@gmail.com • 843.909.0113

Clemson, SC 29631

EDUCATION

Clemson University

Bachelor of Science in Financial Management and Management
Concentrations: Corporate Finance and General Management
Minors: Accounting and Philosophy

Clemson, SC

May 2024

GPA: 3.15/4.00

University of South Carolina Salkehatchie

Associates of Science
High Honors

Walterboro, SC

August 2020

EXPERIENCE

Head Peer Leader

First-Year Academic Programs, Clemson University

May 2022 – August 2023

Clemson, SC

- Provide mentoring and support to 30 incoming first-year students
- Coordinated and facilitated events attended by a range of 10-100 students
- Led 15 Peer Leaders by providing them with resources and support in order to complete job duties

Teller

Bank of the Lowcountry

May 2021 – August 2021

Walterboro, SC

- Greet customers and assist with needs in a timely manner
- Complete and maintain proper documentation for deposits, withdrawals, and loan payments
- Maintain a cash drawer of 5,000-10,000 dollars

LEADERSHIP EXPERIENCE

Alpha Phi Omega, Professional Service Fraternity

Bylaws Chair

Membership Vice Chair

September 2022 - Current

Fall 2023

Spring 2023

Beta Alpha Psi, International Honor Society for Accounting and Finance

VP of Community Service

January 2023 - Current

Fall 2023 – Spring 2024

Art Club, Clemson Student Run Campus Organization

Treasurer

September 2021 - Current

Fall 2023 – Spring 2024

AWARDS AND HONORS

Alpha Phi Omega President's Award for Outstanding Leadership

Alpha Phi Omega Outstanding Service Certificate

University of South Carolina Presidents List

University of South Carolina Deans List

Spring 2023

Spring 2023

Spring 2020

Fall 2019

CAMPUS INVOLVEMENT AND HOBBIES

Campus Involvement: Clemson University Student Government Organizations and Outreach Committee,
Alpha Phi Omega National Site Selection Committee, The Chronicle

Hobbies: Hiking, Weightlifting, Painting, Plants

William Riley Bates

Wbates2@g.clemson.edu

443-631-6016

Education

Clemson University, College of Business

December 2023

Bachelor of Science in Financial Management

Cumulative GPA: 3.93/4.0

Minors: Accounting and Economics, Emphasis: Investments and Banking

Work Experience

LPL Financial- Summer Intern Wealth Management Solutions

Charlotte NC, Summer 2023

- Conducted due diligence on investment products and conducted risk analysis to ensure compliance with regulatory requirements and internal guidelines.
- Updated a comprehensive product list of all current investment products LPL has available for trading. Concluded with the list being sent out to potential advisors as recruiting material.

Adage Capital – Investment Analyst Intern

Boston, MA Spring 2023

- Worked for a senior portfolio manager who managed a net zero equity book.
- Conducted comprehensive research of an individual stocks competitive landscape, market trends, and financial performance. I used this research to create a financial model and a stock report. My stock pitch to senior management concluded with senior management buying the stock.
- Assisted in the due diligence process for potential investments. Prepared 10 reports that summarized the results of a company's earnings call and performed analysis on what that would mean for the stock.

Chapelgate Presbyterian Summer Youth Intern

Baltimore, MD Summer 2021 + 2022

- Coordinated event logistics such as scheduling volunteers, preparing meeting agendas, and overseeing social media accounts. Regularly had attendance of over 100 middle and high school students.

Relevant/Leadership Experience

Relevant Course Work

- Financial Economics: Completed multiple case studies where we were tasked with calculating discount rates, building DCF models, and running CAPM regressions. Analysis was then completed to make a recommendation to a mock board of directors.
- Financial Derivatives: Looked at strategies to hedge risk using options, futures, and forward contracts. Special emphasis was placed on interest-rate futures, stock-index futures, and foreign exchange futures.

Class Projects

- Black Sholes Project: Created Black Scholes and binomial tree option pricing model's in Excel.
- Capital Structure Project: Created a model to determine Microsoft Corps(MSFT) optimal capital structure. Calculated MSFT's indifference point criterion, expected EBIT, and performed cash insolvency analysis.

eBay Resale Business

October 2021-March 2022

- Achieved monthly sales of over \$1000 a month, ROI of 300%, and a 100% customer satisfaction rating.
- Learned a lot about logistics and effective inventory management. Stopped doing business due to difficulty to scale in my college apartment + not worth the \$ per hour wage.

Clemson FCA – Outreach team leader

September 2021-Present

- Coordinated with local elementary schools to provide thanksgiving boxes for 70 families in need. Helped to raise over \$2,000.

Interests/Activities/Awards/Skills

- **Extracurricular Activities:** Clemson FCA, Finance Club, Wall Street South Investment Club
- **Interests:** intramural sports, poker, hiking, golf, investing (started in 2016 + read investing literature)
- **Skills:** Proficient with Microsoft Office, Bloomberg Machines, Factset.
- **Awards:** Beta Gamma Sigma, IM volleyball champion, Hardin Mem Scholarship, Tollison Scholarship

Leighton Becker

(843) 910-1362 | lmbecker02@gmail.com

Education

Clemson University, College of Business
Bachelor of Science in Financial Management

Clemson, SC
May 2024

- **Emphasis:** Corporate Finance
- **Minors:** Accounting & Sports Communication

Experience

Clemson Football

August 2022 - Present

Student Equipment Manager

- Serve as an assistant to Offensive Coordinator/Quarterback coaches Garrett Riley and Brandon Streeter
- Work as a ball rotation specialist on the sideline for referees and the team during games
- Lead 15 younger student managers in daily tasks
- Throw, catch, snap footballs, and prepare drills for quarterbacks at practice
- Spot the ball, flag plays, manage the clock, and shag footballs for team practices
- Wash, fold, and organize laundry for 135 players and 80+ coaches and staff each week
- Clean cleats and helmets for the entire roster after each game
- Pack the team's equipment and clothing for each home and away game

Carolina Cannery Inc.

May 2022 - August 2022

Finance & Accounting Intern

- Performed time and machine studies in five different locations of the plant to track downtime and reduce waste using a stopwatch and Excel
- Produced detailed reports with specific conclusions and solutions regarding the data from the time and machine studies using Word
- Increased efficiency by organizing files for the finance and accounting departments
- Shadowed head of finance, a cost accountant, and a management accountant to gather an understanding of daily tasks and responsibilities

Clemson Football

August 2021 - May 2022

Video Student Assistant

- Served as an end zone and ground filmer for practices
- Transported SD cards of game film from camera booths to the video director
- Organized and edited practice and game film from every D1 football program
- Packed cameras, computers, cables, and other devices for home and away games

Schaeffler

May 2021 - August 2021

Project Management Intern

- Assembled multi-colored tape to the floor around the plant to create efficiency and safety
- Organized a closet full of old files and project materials
- Filmed machine changeovers to give the engineers a visual of the operators setting up and using the machine so more efficient methods could be devised
- Sat in on over 10 management meetings and gained an understanding of the company, the industry, and methods of solving problems as a team
- Performed research to help engineers decide the purchase of a \$1 million machine was necessary

Honors and Involvement

- **Leadership:** Secretary of Turning Point USA chapter at Clemson, Truist Emerging Leader Certification
- **Awards:** Eagle Scout, Dean's List
- **Team Activities:** Intramural wiffle ball, intramural ultimate frisbee, and church softball

GUSTAVOUS H. BELL V
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EDUCATION

CLEMSON UNIVERSITY Clemson, SC
May 2024
Wilbur O. and Ann Powers College of Business
Bachelor of Science in Financial Management
Emphasis in Real Estate
Minor in Accounting

WORK EXPERIENCE

GEORGIA BANKING COMPANY Atlanta, GA
Summer 2023

Intern

- Gained firsthand experience in the fields of Commercial and Industrial lending, ESOP and Specialty Finance
- Prepared presentation to bank leaders on opportunities to grow deposits based on analysis and research
- Developed a plan for bank to create a Minor Savings Account
- Wrote out proposal to executives / board for a Market Advisory Board
- Analyzed financial statements and learned how to utilize Credit Lens
- Created models in Excel, noting important ratios for the bank
- Assisted team leadership in preparation for meetings with borrowers and potential customers

HUSSEY GAY BELL INC Savannah, GA
Summer 2019

Survey Intern

- Operated Trimble equipment and used CAD software for Civil Engineering design Summer 2018
- With the Trimble survey equipment, I also prepared the site to take the measurements Summer 2017

POINT PLEASANT DAY CAMP Savannah, GA
Summer 2018

Group Leader

- Oversaw groups of approximately 20 kids aged 6-12 yrs. Summer 2017
- Provided oversight of children during activities
- Developed patience and larger sense of responsibility by maintaining order and always having a smile
- Demonstrated leadership by working with the activity leaders in helping them out in their jobs

LEADERSHIP AND ACTIVITIES

Brother of Kappa Alpha Order November 2020 - Present
Real Estate Club August 2023 - Present
Wall Street South August 2023 - Present

PHILIPPE BLANC

Philippeb789@gmail.com · (301) 646-6525

EDUCATION

Clemson University, Wilbur O. & Ann Powers College of Business **Clemson, SC**
Bachelor of Science in Financial Management May 2024
Minor Accounting, Emphasis: Investment Banking
GPA: 3.0/4.0

WORK EXPERIENCE

NORTHWESTERN MUTUAL **Rockville, MD**
Financial Representative Intern Summer 2023

- Specialized in financial planning, client relationship management, and wealth management.
- Collaborated on personalized financial strategies and nurtured client connections.

PacWest Bancorp **Rockville, MD**
Summer Associate Summer 2022

- Worked in National Lending Department and conducted basic tasks for credit file reviews which included internal auditing and loan review and data work.

U.S Chamber of Commerce **Washington, DC**
CORPORATE RESEARCH INTERN Summer 2021

- Conducted research on companies, prepared analysis briefings of industries for senior staff, attended corporate briefings and assisted with data entry.

Office of Senator Lamar Alexander (R-TN) **Washington, DC**
CONGRESSIONAL INTERN Summer 2020

- Handled correspondence, constituent complaints, attended Senate hearings and managed general office duties.

LEADERSHIP EXPERIENCE

Big Man On Campus Competition
Winner

- Participated in a school wide competition to raise money for breast cancer, and won the competition raising over \$7,000 for breast cancer awareness philanthropy.

Delta Chi Fraternity
House Manager

- Elected house manager, Member of the rush committee and social committee

ACTIVITIES, AWARDS, AND INTERESTS

Activities: Finance Club, Volunteer at the Seneca Animal Shelter and Homeless Shelter, Member of The Delta Chi Fraternity

Awards: National Society of Leadership and Success

Interests: Sports, Travelling

Ori Boucvalt

(512) 650-7277 | oboucva@clemson.edu

EDUCATION

Clemson University May 2024
Bachelor of Science in Financial Management | GPA 3.9/4.0 Clemson, SC
Minor in Accounting
Emphasis in Real Estate

EXPERIENCE

South Carolina Community Foundation Clemson, SC
Marketing Executive (20 hours/week) Aug. 2022 - Present

- In charge of all the marketing needs of the foundation
- Developed a social media presence for the foundation
- Managed and maintained all social media accounts for the foundation

James Hansen LLC Internship Clemson, SC
Residential Homebuilder Assistant (15 hours/week) Aug. 2022 - Present

- Assisted with the coordination and oversight of multi-million-dollar residential homebuilding project
- Tracked the budget, timeline, and communications between James Hansen LLC and the general contractor, subcontractors, supplier, and owners

Environmental Safety & Health Internship Austin, TX
Accounting and Finance Department Assistant (20-40 hours/week) Jan. 2020 - Present

- Assisted with payroll, deposits, invoices, organization and digitalization of company records, and financial statements

LEADERSHIP

Clemson Flying Club Clemson, SC
Finance Committee Aug. 2022 - Present

- Managed the financial responsibilities of the club by collecting dues, determining rental rates for each aircraft, creating a budget, reconciling bank statements, and creating financial statements for auditors

E-Life Louisiana & Texas
Co-owner 2017 - Present

- Created a corporation whose mission is to raise funds for environmental non-profits
- Donated over \$5,000 to Coastal Conservation Association

Leukemia & Lymphoma Society (LLS) Austin, TX
Team Captain Jan. 2020 - Mar. 2020

- Assembled a team to fundraise for the Leukemia and Lymphoma Society in the 2020 Student of the Year competition
- Won LLS Student of the Year by raising a total of \$255,320 in the two-month competition

INVOLVMENT AT CLEMSON UNIVERSITY

Member of the Clemson Finance Club Aug. 2022 - Present
Member of the Clemson Flying Club Aug. 2021 - Present
Member of Zeta Tau Alpha Aug. 2020 - Present
Member of Women in Business Aug. 2020 - Present

EXTRACURRICULAR

Flight School Aug. 2021 - Present
Private Pilot License (PPL)

- Pursuing an instrument rating (IR)
- Accumulated over 70 flight hours

AWARDS

Clemson University's President's List- Spring 2021, Fall 2021, Spring 2022, & Spring 2023
Clemson University's Dean's List- Fall 2020 & Fall 2022
LLS Student of the Year- 2020

Nathan Bragg

212 Pine Street Clemson, SC 29631 | (803) 846-4733 | nate9895@yahoo.com

Education

Clemson University - Wilbur O. and Ann Powers School of Business **Clemson, SC**
Bachelor of Science in Financial Management **May of 2024**
Bachelor of Science in Accounting

- Cumulative GPA: 3.94/4.00 Major GPA: 4.00/4.00
- Minor: *Spanish Studies* Emphasis: *Financial Planning*
- Clemson Honors College Student

CLIP Clemson Study Abroad Program: Granada, Spain **Summer 2022**

Professional Experience

Preservation Specialists Internship **Summer 2023**
Full Time Advising Intern | Columbia, SC

- Interned at a retirement-focused advising firm that consisted of sitting in client meetings, taking client phone calls, and business processing.

Blue Ridge Financial (Ameriprise) Internship **Fall 2023**
Part Time Advising Intern | Clemson, SC

- Intern at Clemson advising firm focused on back-office tasks and client maintenance.

SC High School Soccer Official **January 2021 - Present**
US Soccer | SC

- High School Official for South Carolina Junior Varsity and Varsity Men's and Women's Soccer.

Leadership Experience

Clemson Welcome Leader **August 2021**

- Served as orientation ambassador for incoming transfers and freshman.

Leadership Practicum Program **August 2021 – January 2023**

- Leadership class that simulated a company environment for the enhancement of my leadership skills and interests.

Omicron Delta Kappa Treasurer **August 2022 - Present**

- Plan, budget, and manage funds of the Greek National Service Organization.

Activities, Awards, and Interests

Activities: Scholars of Finance Club, Wall Street South Investment Club, SIE Creative Inquiry
Delta Chi Fraternity, Club Soccer, Meals on Wheels Charitable Organization

Awards: Bloomberg Certification, Order of Omega, Hilton Head Marathon Finisher

Interests: Studying for Certified Financial Planner (CFP), Capital markets, Running, Travel, Leadership

JACK D. BRANDEEN

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EDUCATION

CLEMSON UNIVERSITY

Clemson, SC

Bachelor of Science in Financial Management

May 2024

Minor in Accounting, Emphasis in Commercial Banking and Investments

- *Academics:* 3.64/4.0 GPA
- *Honors:* President's List, Dean's List

PROFESSIONAL EXPERIENCE

TECHTRONIC INDUSTRIES

Glen Burnie, MD

Field Sales and Marketing Intern

June 2023- August 2023

- Established and leveraged relationships in store to increase sales comp 9.41% from previous year
- Helped manage overall sales volume of \$1,547,832 YTD as of end of July
- Planned and executed demonstration and sales events to drive sales of Techtronic Industries products

THE SEAFOOD SHANTY

Edgartown, MA

Server

May 2022- August 2022

- Waited on four to six tables, generating approximately \$2,000 dollars in sales per six-hour shift
- Calculated and distributed a "tip out" of two percent of daily sales to bussers, food runners, and bartenders, along with a 0.5 percent tip out to hosts

BUDDY'S CRABS & RIBS

Annapolis, MD

Server

May 2021- August 2021

- Served three to five tables, focusing on keeping customers happy while also ensuring quick delivery of drinks and meals to maximize daily sales

PAPA JOHN'S PIZZA

Severna Park, MD

Delivery Driver

March 2020- January 2021

- Made accurate and timely deliveries during the beginning of the COVID pandemic to customers who were unable to leave the safety of their homes
- Helped implement the "No-Contact Delivery" option at this location

EXTRACURRICULAR ACTIVITIES

BETA THETA PI

Clemson, SC

Judicial Board Member

January 2022 – Present

- Evaluate cases on member rule infractions and decided on fair, impartial resolutions
- Elected by my graduating class as our sole board representative for my integrity and responsibility

REAL ESTATE CLUB

Clemson, SC

Member

December 2021 – Present

- Meet with professionals of the field in order to get a grasp of what their job is like, the traits they look for in a potential employee, and steps to take to follow in their path

HIGHLIGHTS

- *Skills:* Communication, Detail-oriented, Excel, Investment Analysis, Leadership, Organization, Problem Solving, Public Speaking, Teamwork, Time Management
- *Volunteer:* Happy Helpers for the Homeless, B+ Foundation Fundraising, Serving People Across Neighborhoods (SPAN)

Zachary T. Braun

zbraun@clemson.edu | (864) 764-5047 | www.linkedin.com/in/zachtbraun

EDUCATION

Clemson University

Bachelor of Science in *Financial Management*
Minor in *Accounting, Emphasis in Commercial Real Estate*

May 2024
Clemson, SC
Cumulative GPA: 3.96/4.00

WORK EXPERIENCE

HPI Commercial Real Estate

Intern

June 2022-August 2022
Austin, TX

- Documented meetings between the development director of HPI and general contractors
- Resolved issues property managers had with several separate warehouse facilities
- Led meetings between HPI and subcontractors
- Executed on tasks needed to complete development sites worth over \$40 million dollars

Northwestern Mutual

Intern

May 2023-August 2023
Austin, TX

- Assisted in more than 80 financial planning meetings with senior financial advisors
- Contacted over 100 potential clients to book initial financial planning meetings
- Handled logistical operations for new clients

LEADERSHIP EXPERIENCE

Delta Sigma Pi

Director of Financial Development

May 2022-December 2022
Clemson, SC

- Collaborated with multiple executive members on events and projects
- Organized fundraisers such as a golf tournament and cocktail event to raise over \$1300
- Contacted over 50 local businesses for donations to the fraternity

COBRA

College of Business Recruitment Ambassador

March 2023-Present
Clemson, SC

- Presented the Wilbur O. and Ann Powers College of Business to groups of parents and recruits
- Highlighted key attributes about the school and campus to attract the attention of the tour groups
- Connected parents and recruits to school faculty for detailed answers to specific questions

OTHER EXPERIENCE

Managed Personal Portfolio

Stock Trader

February 2020-Present
Spartanburg, SC

- Controlled personal investments since age 16, buying and selling stocks on electronic brokerages
- Managed downside risk through diversification into 7 separate industries
- Expanded portfolio over time to a value over \$20,000 through taking calculated risks

Delta Sigma Pi Business Fraternity

Member

April 2022-Present
Clemson, SC

- Developed time management and professional skills through the pledging process
- Networked with professionals across many business industries
- Assisted in community service including cards for children in hospitals and visiting nursing homes

Investment Research Club

Member

August 2021-May 2023
Clemson, SC

- Researched potential investment opportunities across multiple industries
- Presented my research to the club with data and charts to support my investment thesis
- Studied different investing techniques including short-term trading and options trading

HONORS & ACHIEVEMENTS

Clemson University's President's List

Fall 2021 & Fall 2022 & Spring 2023

Clemson University's Dean's List

Spring 2022

Palmetto Fellows Scholar

August 2021

LAH Exam Certification

April 2023

Madeleine Brock

182 Fernwood Terrace, Garden City, NY 11530 | (516)270-6838 |mrbrock@clemson.edu

EDUCATION

Clemson University **Clemson, SC**
Bachelor of Science in Financial Management *May 2024*
Minor in Accounting, Emphasis in Corporate Finance *GPA 3.24/4.00*
WORK EXPERIENCE

Uline Shipping Supply Company **New York, NY**
New York Sales Intern *May 2023-August 2023*

- Achieved 3rd place in the New Item Sales Intern Competition that covered New York, Boston, and Pennsylvania.
- Assisted customers by analyzing their business needs and recommending products, resulting in increased operational efficiencies and cost savings.
- Demonstrated outstanding customer service, contributing to successful growth that generated \$30,291 in sales.
- Effectively expanded Uline's customer base through 22 successful Cold Call conversions and 85 customer visits.
- Developed comprehensive memorandums analyzing intern performance and identifying strategic penetration opportunities based on top spending Zip Codes across Long Island.

New York Life Insurance Company **White Plains, NY**
Corporate Sales Intern *June 2022-August 2022*

- Led a team of interns in the development of an onboarding training deck for new insurance agents.
- Documented and researched the lifecycle of New York Life agents and their competitors in collaboration with interns.
- Presented an analysis of the lifecycle of agents to the executive leaders and senior management to help manage the New York Life agent lifecycle and improve the agent experience.
- Researched life insurance industry publications and distributed them to New York Life agents to supplement marketing material.

Clemson Phonathon Program **Clemson, SC**
Ambassador *September 2021-May 2022*

- Served as an ambassador for the Finance Department.
- Worked with other ambassadors to surpass our fundraising goal of 1MM in alumni contributions.
- Engaged with alumni to discuss ways to improve the University and enhance the student, faculty, and alumni experience.

Vigorito, Barker, Patterson, Nichols, and Porter LLC **Gardeu City, NY**
Legal Intern *June 2018- August 2021*

- Planned weekly assignments with attorneys and legal professionals.
- Aided in the transition to an online database and ensured medical records and documents of over 100 plaintiffs
- Communicated timely status updates to attorneys and interns on numerous projects throughout the week.

INVOLVEMENT

Delta Sigma Pi **Clemson, SC**
Member *October 2021-Present*

- Participate in professional and community service events to promote and uphold the values of the fraternity
- Explore personal development through professional events, community service, and social activities

College of Business Recruitment **Clemson, SC**
Ambassador *September 2021-Present*

- Inform prospective students about the Wilbur O. and Ann Powers College of Business
- Facilitate tours for families and prospective students to showcase the College of Business and Clemson's campus

Sales Innovation Program **Clemson, SC**
Member *September 2021-Present*

- Attend numerous networking events with the program's 16 sponsors from the Southeastern region of the United States
- Collaborate with salespeople, managers, and executives to address current trends and industry issues

Claire Burke

4837 W Street NW, Washington, DC 20007 | 202-909-5590 | cburke9@clemson.edu

Objective

- Personable and dependable Financial Management student at Clemson University seeking an opportunity to apply my skills and learn in a professional environment.

Education

Clemson University | *Bachelor of Science in Financial Management* May 2024 | *Emphasis in Corporate Finance* | *Accounting Minor* | **3.96/4.00** GPA

- Proficient in Microsoft Word, Excel, PowerPoint, JMP, Bloomberg, Adobe Creative Cloud and social media platforms
- Applied Finance and Accounting methods to calculate, analyze, and interpret numerical data to solve problems that mimic business operations

University of New South Wales - Sydney, Anstralia *Spring 2023*

- Studied abroad for the Spring of 2023 in Sydney Australia - taking finance courses as well as courses specified to the Sydney Environment to be more immersed into the culture.

Experience

Intern at United Bank 2023

- Explored diverse banking functions through rotational programs including retail, lending, credit, wealth management, and operations. Led in-depth projects within each department, delivering impactful solutions and insights. Delivered polished presentations on project findings to key stakeholders, demonstrating strong analytical and communication skills.

Waitress at Cafe Vino, DC 2021/22

- Served lunch and dinner for 50-75 customers per shift while following COVID-19 guidelines.
- Memorized the entire menu, including prices, and rotating specials to ensure all customer questions could be answered professionally, honestly, and in a timely manner.

Bloomberg Market Project experience

- As part of my Investment Analysis class, I built my Bloomberg financial market experience by doing a mutual fund analysis, yield curve analysis, and a corporate bond analysis.

Honors and Professional Organizations

Honors/awards:

- Clemson President's List: *Fall 2020, Spring 2021, Fall 2021, Fall 2022*
- Clemson Dean's List: *Spring 2022*

Organizations:

- Chi Omega Fraternity *August 2020 - Present*
- Make a Wish Foundation *August 2020 - Present*
- Best Buddies *September 2020 - Present*

Community Service:

- **Kids on the Move:** Co-founder of an on-going service project that collects, refurbishes, and distributes bikes to children in the inner city of Washington DC in need of transportation. Since inception 6 years ago, over 300 bicycles have been distributed to youth in need.

Luke Caporicci

90 Willow St • Garden City, NY 11530 • lukecap18@gmail.com • (516) 270-8805

Education

Clemson University

Bachelor of Science Degree, Financial Management.

Minors: Accounting and Management Information Systems

Emphasis: Banking and Investments

Language: Intermediate level of Spanish

Clemson, SC

May 2024

GPA: 3.4/4.0

Experience

Goldman Sachs

Intern- Controllers Division

Dallas, TX

June 2023-August 2023

- Worked on the Real Estate Equity Fund team within Fund Accounting.
- Trained and worked with various software such as Excel, and other Goldman Sachs software platforms.
- Prepared various financial reports, and deliverables throughout the summer.

Mina Llano Higgins Group, LLP

Accounting Intern

Melville, NY

May 2022 – August 2022

- Helped prepare financial reports and assist with other tasks within the office.

Cherry Valley Club

Team Leader of Junior Maintenance Team

Garden City, NY

June 2017 – August 2021

- Operated basic maintenance equipment, including walking mowers, line trimmers and blowers.
- Operated ride on equipment used to maintain large turf areas, including greens, fairways and rough.
- Coordinated junior staff's weekly schedule. Organized teams to complete maintenance tasks assigned by my supervisor.

Leadership & Activities

Phi Sigma Kappa Fraternity

Various Chair Positions/Committees

Clemson, SC

Sept. 2020-May 2024

- Brotherhood Committee: Spring 2022
 - Lead, planned, organized, and executed brotherhood activities. Created a calendar of brotherhood events for each semester.
- Recruitment Team: Spring 2021-Spring 2024
 - Marketed and promoted values and contributions Phi Sigma Kappa brings to Clemson campus life in order to recruit new members.
- Events Chair: Spring 2021
 - Organized, scheduled, and negotiated vendor contracts for social events for Phi Sigma Kappa

Volunteer

- Special Olympics of South Carolina
 - Raised money and participated in the Polar Plunge. Donated funds raised to the Special Olympics of South Carolina

Kelli Carlos

Clemson SC, 29631 | 630.246.1413 | kcarlos@g.clemson.edu | www.linkedin.com/in/kellicarlos

EDUCATION

Clemson University | Wilbur O. and Ann Powers College of Business | Clemson, SC | May 2024

Bachelor of Science in Financial Management, Emphasis in Corporate Finance

Minor in Accounting

Overall GPA: 3.9/4.0

Relevant Coursework: Corporate Financial Analysis | Corporate Valuation | Financial Management | Financial Institutions & Markets | Investment Analysis | Statistics | Financial Accounting | Cost Accounting

WORK EXPERIENCE

Corporate Finance Intern | HAVI | Chicago, IL | May 2023 - August 2023

HAVI's data-driven analytic insights provides innovation, strategies, and solutions for diverse global brands and businesses.

- Contributed to maintaining strategic growth towards \$94 million dollar target reach revenue for 2023 by collaborating in a group of 4 to generate a brand new Power BI dashboard for financial reporting.
- Assisted the Director of Finance in reporting the year-to-date advancement in \$70 million annual budget of key stakeholders by formulating coherent data visualizations in monthly financial presentations.
- Augmented employee satisfaction by collaborating with a team of 7 to organize monthly employee engagement events to enrich company-wide work-life balance initiatives.

Commercial Real Estate Intern | KMA Companies | Chicago, IL | May 2022 - August 2022

KMA Companies serves as an owner's representative for A Safe Haven Foundation, aiding the homeless and displaced veteran population to self-sufficiency by developing, owning, and managing affordable properties.

- Maximized lease renewal efficiency by taking full ownership of end-to-end document organization for 120 units, resulting in a 50% decrease in processing time and overall enhanced operational efficiency.
 - Managed incoming revenue by meticulously collecting and digitally processing over \$50,000 in rent collection checks.
 - Facilitated living condition enhancements surpassing a total value of \$1,000 for tenants in need by performing routine site inspections.
-

ACHIEVEMENT & INVOLVEMENT

President's List (4.0 GPA) | Clemson University | Fall 2021 | Spring 2021 | Spring 2023

Dean's List (3.5+ GPA) | Clemson University | Fall 2020 | Spring 2022 | Fall 2022

Chi Omega Sorority | Clemson University | August 2020 - May 2024

Make-A-Wish Foundation Volunteer | Clemson, SC | August 2020 - May 2024

- Collaborated in the execution of six dynamic on-campus fundraising events, directly resulting in the fulfillment of over 30 wishes for local children courageously battling critical illnesses.

A Safe Haven Foundation Volunteer | Chicago, IL | May 2022 - August 2022

- Participated in weekly outreach programs to individually connect with previously homeless and displaced veteran tenants of KMA properties, understanding and advocating for unique needs and challenges.
-

SKILLS

Analytical | Collaborative | Critical Thinking | Detail Oriented | Self Motivated | Coachable | Communication | Teamwork | Time Management | Problem Solving | Financial Modeling | Data Analysis | Microsoft Power BI, Excel, Powerpoint, Word

Ryan T. Carney

Phone: (980) 214-4349

Email: rcarney3425@gmail.com

Linkedin: Ryan_Carney2

EDUCATION

Clemson University, Clemson, SC

May 2024

Wilbur O. and Ann Powers College of Business

- Bachelor of Science in Financial Management
- Minor in Accounting, Emphasis in Banking and Investments
- GPA: 3.12/4

WORK EXPERIENCE

Clemson Campus Recreation, Clemson, SC - Welcome Center Assistant

May 2022 -Present

- Responsible for maintaining safe facility points of access through membership verification
- Provide a safe, welcoming, and inclusive environment for all patrons

Clemson Campus Recreation, Clemson, SC - Sports Programs Assistant

July 2023 - Present

- Assist in administration of sports program activities and events
- Oversee the results entry process for intramural and club sport activities

Barefoot & Company, Indian Trail, NC

May 2021 - August 2021

- Installed windows and worked with experienced staff to learn building trades
- Ensured customer service was superior

Sam's Xpress Car Wash, Mint Hill, NC

June 2019 - August 2020

- Lead Crew Member
- Cleaned cars and assisted customers with any issues with cleaning equipment

LEADERSHIP & VOLUNTEER EXPERIENCE

Delta Chi National Fraternity, Clemson, SC

January 2022 - Present

- Member Rush Committee-Worked closely with Recruitment Chair on seeking out, recruiting, and on boarding new members of the Clemson Chapter
- Raised funds and awareness for the V foundation for Cancer Research through philanthropic events on campus
- Participated in a 5K and led a volleyball team to raise money to support the Ronald McDonald House

Mission Trips: Sylacauga, AL, Brownsville, PA, Baltimore, MD, and Nashville, TN

June 2016, 2017, 2018, 2019

- Mission trips where we worked with organizations to assist the homeless population of each city
- REACH Mission Trips where we worked on a team that repaired homes for a people in need

Rainbow Express Camp Counselor, Matthews, NC

July 2017, 2018, 2019

- Worked as a counselor for a camper with special needs

ACTIVITIES & CERTIFICATIONS

- Clemson Finance Club
- Wall Street South Investment Club
- Clemson Consulting Club
- CPR Certified American Red Cross
- Autodesk Revit Architecture Certification
- OSHA Certification

SKILLS & TRAITS

- Proficient in Microsoft Word, Excel, and PowerPoint
- Hard-Working, Punctual, Compassionate, Competitive, Trustworthy

Ethan Carr

43 Mainsail Drive, Salem, SC 29676
315-525-6234 carrethan05@gmail.com

EDUCATION

Clemson University

Bachelor of Science in Financial Management, Accounting Minor
Emphasis in Real Estate
Merit Scholarship
Study Abroad, Italy: Summer 2022

Anticipated May 2024
Clemson, SC

RELEVANT WORK EXPERIENCE

Fund Accounting Intern

RXR Realty

June 2023-August 2023
Uniondale, NY

- Worked on various tasks with the accounting team and corporate controller.
- Completed projects to supply investment teams with necessary information.
- Reviewed fund financials and partner contracts.
- Visited development sites around NYC and Long Island.
- Attended information sessions with leaders across the commercial real estate industry.

Cart Staff

Keowee Key Golf Course

May 2022-August 2022
Salem, SC

- Planned and executed golf leagues and tournaments.
- Worked with guests and members to fulfill needs and complete tasks.
- Created and delivered a topnotch customer experience.

Landscaper and Greenskeeper

Turning Stone Resort and Casino- Atunyote

May 2021-June 2021
Vernon, NY

- Managed time to complete multiple daily tasks.
- Quickly learned new skills on how to maintain and use new equipment.
- Worked with managers and other greenskeepers to coordinate work and tasks.

SKILLS AND EXPERIENCE

Proficient in Microsoft Office, specifically Word, Excel, PowerPoint.
Experience in Accounting and Property management Yardi Software.
Youth soccer, hockey coach and lifeguard.
Organized and executed large philanthropic events.

EXTRACURRICULAR ACTIVITIES

Real Estate Club, Clemson University

Spring 2023-Present

- Completed and received CoStar Commercial Real Estate Analytics Certification (CREA). Clemson, SC
- Attend speaker sessions with Real Estate professionals who share their expertise and experience.

Theta Chi Member, Clemson University

Fall 2021-Present
Clemson, SC

- Commitment to philanthropy events and community service.
- Networked with brothers and Alumnus.

Club Hockey, Clemson University

Spring 2021
Clemson, SC

- Commitment to team building and weekly practices.

Matthew Cassanelli

(561) 309-1062 | matthewcassanelli@gmail.com | www.linkedin.com/in/matthew-cassanelli

EDUCATION

Clemson University – Wilbur O. Ann Powers College of Business

Clemson, South Carolina

Bachelor of Science in Financial Management

May 2024

• **Emphasis:** Corporate Finance; **Minor:** Accounting

| **GPA:** 3.54/4.00

• **Honors:** Dean's List 2x (2022, 2023)

• **Relevant Coursework:** Financial Accounting Concepts, Management PC Applications, Financial Management I & II, Intermediate Financial Accounting I & II, Cost Accounting, Spreadsheet Applications in Finance

• **Organizations:** Clemson Finance Club, Wall Street South Investment Club, Clemson Stock Club

WORK EXPERIENCE

Deloitte

Boca Raton, Florida

Engagement Financial Advisor Intern

June 2023– August 2023

- Supported >30 different engagements to help boost revenue and reduce expenses for Deloitte
- Exposed to all four Deloitte businesses: Consulting, Audit & Assurance, Tax and Risk & Financial Advisory
- Provided services as an internal project controller, focusing on tracking revenue, costs and profitability
- Had responsibility for applying project management principles in order to participate in full project life cycles
- Assisted leadership with financial analysis, as well as preparing budgets, forecasting and project billings and receivables
- Applied Standardized Reporting Tools in order to provide important information to leadership and teams using KPIs
- Focused on refreshing Excel spreadsheets using queries and macros in order to provide up to date information for billings, revenue and engagement margins

Corporate Forensics Advisory LLC

North Palm Beach, Florida

Finance/Accounting Intern

June 2022– August 2022

- Assisted in capturing actuals for a 13-week forecast model for a technology client with >\$1B in revenue
- Worked with a team on understanding and explaining variances of actuals and forecasts
- Contributed in preparing a borrowing base certificate and complied with lender's loan covenants
- Refreshed Excel spreadsheets, created PowerPoint presentations and prepared for client phone calls and negotiations with team

Costello's Trattoria

Jupiter, Florida

Waiter/Cashier

May 2021– August 2021

- Served and prepared drinks and food for customers
- Answered phone calls for reservations and to-go orders
- Handled cash and credit cards to finalize sales for the restaurant
- Set and bussed tables throughout the shift

ACTIVITIES

Wall Street South Investment Club at Clemson University

- Given \$100,000 in a trading simulation to manage an investment portfolio featuring stocks, bonds, mutual funds, options, futures and international stocks
- Adjusted investment strategy over 30 weeks in order to maximize returns
- Outperformed the market and 200 students during an economic downturn with a 12% higher rate than the S&P 500

SKILLS, CERTIFICATIONS AND AWARDS

Technical Skills: Microsoft Word, Excel, PowerPoint

Soft Skills: Communication, Time Management, Leadership, Analytical Thinking, Financial Decision Making, Project Management

Certifications: Bloomberg Market Concepts, Wall Street Prep Excel Crash Course, McGraw Hill Microsoft Excel

Awards: President's Volunteer Service Award Gold Medal, Pending Silver Congressional Medal

Katie Catledge

1319 Churchill Drive
Lancaster, SC 29720

(803) 577-3565
katiecatledge@gmail.com

Hardworking and energetic double major in Accounting and Financial Management pursuing an entry level financial services position. Eager to apply industry knowledge and skills while taking on new challenges and opportunities. A candidate for the FINRA Licensing Exam in Fall 2023 sponsored by Morgan Stanley.

EDUCATION

Clemson University | Clemson, SC

Bachelor of Science in Accounting, Minor: Management

Bachelor of Science in Financial Management, Emphasis: Financial Planning

May 2024

GPA: 3.49/4.0

Relevant Projects:

Capstone Project — "Investment Proposal"

Summer 2023

- Created a financial plan using LifeView software and market research to generate persuasive investment strategies for a hypothetical client.

PROFESSIONAL EXPERIENCE

Morgan Stanley | Charlotte, NC

June 2023 - August 2023

Wealth Management Intern

- Learn how Financial Advisors identify new opportunities and develop client relationships.
- Perform market research and analyze financial data for client portfolios using excel and 3D software.
- Assist in sales and operations functions to streamline processes and strengthen the client experience.

Center for Student Leadership and Engagement | Clemson, SC

January 2022 - July 2022

Orientation Ambassador

- Assisted new students through their transition to Clemson
- Facilitated events for cohorts of 100+ students including workshops for community building.

Nutramax Laboratories | Lancaster, SC

June 2021 - August 2021

Accounting Intern

- Tagged assets as part of an inventory project while utilizing SAP Software.
- Assisted with accounts payable including bank reconciliations and depreciation

Trimnal & Myers Law Firm | Lancaster, SC

July 2019 - August 2020

Administrative Assistant

- Responsible for handling legal documents while engaging various partnering institutions.
- Provided administrative support, including answering client calls, and document management

TECHNICAL PROFICIENCIES

- Bloomberg Machine
- Quicken
- Microsoft Suite
- Tableau Software

PROFESSIONAL DEVELOPMENT/LEADERSHIP

Alpha Delta Pi | *Vice President of Finance - Accounts Payable*

November 2022 - Present

Clemson University Financial Planning Association | *Member*

August 2022 - Present

Women in Business Club | *Member*

August 2020 - Present

Rotaract Club | *Member*

January 2022 - Present

College of Business Recruiting | *Ambassador*

November 2022 - Present

College of Business Student Advisory Board | *Accounting Representative*

November 2022 - Present

James Cirifalco Financial Management / Accounting / Real Estate

jcirifa@g.clemson.edu. 3125 Grass Marsh Drive Mount Pleasant, SC 29466. (203)722-8348.

Education

Clemson University May 2024	<ul style="list-style-type: none">● Major in Financial Management, minor in Accounting, emphasis in Real Estate● 3.0● Real Estate Club● IFC New Member Mentor● Alpha Gamma Rho Fraternity● Dream Team Prosthetics Philanthropy● Spring 2023 Dean's List	Clemson, South Carolina
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Work Experience

JC Landscaping and Lawn Care 2018-Present	<ul style="list-style-type: none">● Founder/Manager● Multiple high school employees amongst various job sites● Sales Experience and soft skills● Used Excel for organization and conciseness● Built schedules/managed projects● References available upon request	Mount Pleasant, South Carolina
Sea Suds LLC. 2020-Present	<ul style="list-style-type: none">● Co-Founder/Manager● Multiple high school employees amongst various job sites● Communicated with clients and priced jobs with the Owner	Mount Pleasant, South Carolina
South East Management 2022-Present	<ul style="list-style-type: none">● Sub Contractor● Worked 4 buildings on one lot with 40 units● Completed service request/renovations big and small● Communicated with the tenants	Charleston, South Carolina

Community Service

Dream Team Prosthetics 2021-2022	<ul style="list-style-type: none">● Prosthetics Fund● Worked on social media advertising, and other help needed to arrange for donations.	Clemson, South Carolina
Kids Stuff Academy 2022-Present	<ul style="list-style-type: none">● Playground Build● Raised money via social media	Clemson, South Carolina

Honors and Awards

- Second Place Stem Project: 2020, Stem Entrepreneurship Class Project, in front of a board of engineer judges.
- 2023 Dean's List: Spring semester

James Clary

Raleigh, NC 27539 | clary5@clemson.edu | 919-527-9121

EDUCATION

Clemson University | Wilbur O. and Ann Powers College of Business
Bachelor of Science in Financial Management
Concentration: Commercial Banking and Investments

August 2024

iXperience – Investment Finance Academy Graduate

July 2023

- 7-week immersive program studying and interning in Investment Finance, taught by one of the world's leading value investors (Wesley Kennedy)
- Developed proficiency in Financial Statement Analysis, Excel Modeling (IRR, M&A, LBO), Valuation Modeling (DCF, Comps), and understanding WACC and the Capital Structure while exploring environments in which companies operate through real world experience

PROFESSIONAL EXPERIENCE

Olive Tree Ventures | New York, NY
ClimateTech Investment Analyst Intern

June 2023 – August 2023

- Break down the built-world ClimateTech landscape into subsectors and include various technology solutions for existing holdings properties in each subsector, as well as analyze them from a VC perspective (i.e. growth potential, whitespace, TAM size)
- Conduct financial analyses on the various potential solutions within the subsectors, including conducting a holistic cost/benefit financial analysis in order to properly convey and compare the cost/revenue and time commitment across various proposals
- Identify and conduct in-depth analysis of potential investments for holdings properties and/or companies that could be a good fit for Olive Tree

Sift Finance | San Francisco, CA
Investment Analyst Intern

August 2023 – Present

- Conducted in-depth analysis of early-stage accessories and apparel company with a +25% YoY growth rate
- Developed a sales and productivity forecast model to assist the Managing Director in making an informed deal structure
- Performed comprehensive research for comparable companies' analysis, and created an extensive TAM analysis
- Building models such as IRR, Sales-Productivity, M&A
- Working closely with early stage company founders and top level investors to coordinate
- Automated existing chlorine processes to reduce operator intervention and costs, while increasing process control by 15%.

LEADERSHIP & ACTIVITIES

Clemson Company C-4 Pershing Rifles | Executive Officer/Treasurer

March 2022 – Present

- Leading team of 20+ members to perform formal military service events
- 200+ Service Hours
- Working closely with top university officials to properly manage significant school funding
- Planning events and maintaining that they are properly executed
- Training members on how to properly perform at events

Sharefish (Non-Profit) | Team Leader/Volunteer

June 2021-Present

- Developed full fluency in Spanish
- Annual 8-day mission trip to El Carizo, Honduras
- 100+ Service Hours
- Building houses and schools for underprivileged children and families

Clemson Army ROTC | Member

August 2020 – May 2022

- Developed leadership effectiveness through consistently training with the United States Army

Clemson Finance Club | Member

August 2023 - Present

- Discuss, debate, and learn about topics regarding current economic and market conditions.

Clemson Hiking Club | Member

August 2020 – Present

- Spend time outdoors and socialize with peers in the mountains of Clemson and surrounding areas

TECHNICAL & INTERESTS

Technical: DCF and LBO Modeling, IRR Modeling, VC Valuation Modeling, Microsoft Excel, Microsoft PowerPoint

Interests: Financial Markets, Volunteer Work, Rifle Drill and Ceremony, College Sports, Country Music, Travel

Katherine “Kaki” Cobb

kwcobb@clermson.edu | (843) 793-7098

www.linkedin.com/in/kaki-cobb

EDUCATION

Clemson University Honors College

Bachelor of Science in Financial Management | Corporate Finance Emphasis | Accounting Minor

Cumulative GPA: 3.65/4.0 | Expected Graduation: May 2024

Lorenzo de' Medici Institute – Florence, Italy

February 2023 - May 2023

- Semester-long immersive experience in Florence while studying at an Italian International Institute.
- Took courses relating to global financial markets, art history, marketing, and authentic Italian cooking.

Summer in Rome Study Abroad – Rome, Italy

May 2022 - July 2022

- 6-week study abroad program at The American University of Rome.
 - Took business law taught by a Clemson professor during the summer I term.
-

WORK EXPERIENCE

FORVIS – Charleston, South Carolina

Audit Intern

June 2023 - July 2023

- Collaborated with associates and managers to audit employee benefit plans in a variety of industries.
- Worked in CaseWare Working Papers, Microsoft Excel, Adobe Acrobat, and Microsoft Word.

Clemson Athletic Academic Services – Clemson, South Carolina

Academic Tutor

January 2022 - May 2022

- Undergraduate academic tutor for Clemson student-athletes.
 - Tutored Business Calculus I, Business Calculus II, and Intermediate Financial Accounting I.
-

INVOLVEMENT and ACTIVITIES

Delta Delta Delta, Beta Theta Chapter – Clemson, South Carolina

Director of Administration

February 2022 - March 2023

- Member of a social and service-oriented fraternity dedicated to uplifting members and promoting academic wellness, campus involvement, and lifetime membership.
- Responsible for tracking member attendance, involvement, and writing chapter minutes.
- Voting member of the 2022 Selection Committee to decide the 2023 slate.

Clemson University Guide Association – Clemson, South Carolina

Tour Guide

October 2020 – Present

- Lead prospective students and families around Clemson's campus.
- Member of the recruitment committee for the 2022 academic year.

Freshman Council – Clemson, South Carolina

Member

September 2020 - May 2021

- Selected as one of 35 freshmen to collaborate with student government on various service and community-oriented projects throughout the academic year.
-

ACADEMIC HONORS

South Carolina Palmetto Fellows Scholarship

Fall 2020 - Present

Dean's List

Fall 2022

President's List (4.0 GPA)

Fall 2020 - Spring 2021

Jared Cohn

201-739-9822
Jacohn20@gmail.com

Oakland, NJ
LinkedIn: @Jared Cohn

Education

Clemson University

Bachelor of Science in Financial Management

Clemson, SC

May 2024

- Cumulative 3.76/4.0 GPA
- Emphasis in Corporate Finance
- Minor in Accounting
- Presidents List Recognition (Fall 2020)
- Dean's List Recognition (Spring 2021, Fall 2021, Spring 2022, Fall 2022, Spring 2023)

Experience

Summer Intern

Tradition

New York, NY

Summer 2023

- Learned basic concepts about brokering and Bloomberg through lessons and shadowing
- Gained insight on various trading desks that each dealt with different securities
- Developed relationships with employees who provided knowledge in brokering and career advice

Golf Caddy

North Jersey Country Club

Wayne, NJ

May 2021 - August 2022

- Administered advice to players while also ensuring companionship
- Provided support to professional and casual golf players by carrying the golfer's bags, cleaning equipment, and maintaining greens

Involvement

Beta Alpha Psi

Member

Clemson, SC

September 2022 - Present

- Selected into international honorary Accounting and Finance organization
- Develop professionally, inclusive of acquiring great communication, networking, and etiquette skills, through interactive and social events

Real Estate Club

Member

Clemson, SC

September 2022 - Present

- Networking and guest speaker events throughout the academic year

Wall Street South Investment Club

Member

Clemson, SC

October 2021 - Present

- Practice in analyzing and predicting investments in the stock market
- Learned strategies from experiences of guest speakers

National Society of Leadership and Success

Member

Clemson, SC

October 2021 - Present

- Joined a community of leaders with access to guest speakers and networking

Delta Chi Fraternity

Member, Mentor

Clemson, SC

August 2021 - Present

- Attended and participated in chapter meetings to better the fraternity
- Acted as personal mentor for the new members to aid with academic and social development
- Participate in community service and philanthropic events

Additional Information

Software/Professional Skills:

- Bloomberg Terminal
- Microsoft Office 365 (Word, Excel, Access, PowerPoint)
- Strong work ethic
- Strategic thinking
- Team player

HENRY M. COMO

445 Main Street, Cold Spring Harbor, New York 11724
(516)-445-1723
hcomo@clermson.edu

EDUCATION

CLEMSON UNIVERSITY Clemson, South Carolina
Bachelor of Science in Financial Management Graduation: December 2023
Dual Minor: Accounting and Economics GPA: 3.69/4.0
Emphasis: Banking and Investments

EXPERIENCE

HOGAN & HOGAN, BRIAR RIDGE PROPERTIES Locust Valley, New York
Associate June 2020 – August 2023

- Produced cost analysis and financial analysis on properties and subsidiary company products
- Produced and maintained basic financial statements for subsidiary town service associations
- Addressed tenant concerns/issues, executed repairs, and coordinated third party intervention when necessary
- Assisted in office correspondence and functioned as liaison between clients and employer

CREST HOLLOW COUNTRY CLUB Woodbury, New York
Junior Tennis Instructor June 2015 – August 2019

- Coached all ages ranging from young adolescents to senior adults in individual lessons and hitters
- Coordinated and assured high quality court maintenance

LEADERSHIP

Order of Omega (Greek Honors Society)
Executive Board – Vice President of Finance January 2023 – Present

- Manage general finances for the organization, creating and maintaining an annual budget
- Present budget to Student Funding Board to receive funding

Phi Gamma Delta (FIJI)
Judicial Board Chairman January 2023 – Present

- Preside over hearings and ensure proper procedure in internal disciplinary cases

Executive Board – Recording Secretary January 2022 – December 2022

- Recorded chapter meeting minutes, managed and facilitated all aspects of internal communication
- Supervised various chairman and committees (Judicial Board, Philanthropy, Community Service, etc.)
- Concealed and held all sacred documents, Bylaws, internal documents, and owner of Google drive and email

Pledge Class President January 2020 – September 2020

- Functioned as a point of contact between brothers and pledge class and carried accountability of pledge class
- Elected by pledge class

Varsity Soccer and Tennis Captain Cold Spring Harbor High School

- Mentored younger players helping them adapt to playing at the varsity level
- Elected by teammates and coaching staff

AWARDS Clemson President's List (4.0 GPA) Fall 2020, Spring 2021
"Unsung Hero" Award, Cold Spring Harbor Athletics Spring 2019
Brother of the Year, XA Chapter of Phi Gamma Delta Spring 2023

ACTIVITIES Clemson Club Tennis, Finance Club, Wall Street South Investment Club

Thomas Cook

843-344-9208 | cookt1330@gmail.com

Education

Clemson University, College of Business

Clemson, SC

Bachelor of Science in Financial Management

May 2024

Minor: Accounting, Emphasis: Banking and Investments

GPA 3.15/4.00 Dean's List (Spring 2021)

Beta Theta Pi (2020-Present)

Palmetto Life Scholarship Recipient '20-Present

Work Experience

Sonic Automotive

Finance Intern

Charlotte, NC

June 2023 – July 2023

- Helped put together 10-Q for financial reporting team
- Used excel to calculate ideal stock buyback windows
- Revised presentations for franchise stores such as Toyota, Jaguar, Porsche etc.
- Worked with internal audit team to look for embezzlement and fraud

My Space Barcelona

Barcelona, Spain

Accounting / Finance Intern

June 2022 – July 2022

- Calculated financial projections for various fields
- Created invoices and managed utility accounts for 70 properties
- Managed rental selections to maximize booking availability
- Calculated rental fees based on demand and availability
- Used trend analysis to estimate expected reservations for upcoming months

Hazzard Marine

Georgetown, SC

Dockhand & Accounting Assistant

April 2021 – August 2021

- Take and receive calls for scheduling transient boat dockage
- Managed the marina's clubhouse shop
- Docked and managed transient boats
- Assisted accountant with day to day responsibilities

Bistro 217

Pawleys Island, SC

Bar Back & Bus Boy

May 2019 – December 2020

- Assistant to bartender
- Food Runner
- Cleaned and set tables

Leadership Roles

Beta Theta Pi Clemson, SC

Fraternity Chorister November 2020 – November 2021

- Organized and orchestrated fraternity brotherhood events
- Participated on the Executive Board of Beta Theta Pi

Skills

Technical Skills: Exemplified knowledge in Microsoft applications (Excel and Word)

Hudson Crabtree

Bristol, VA | 423-956-9419 | hccrabt@g.clemson.edu | www.linkedin.com/in/hudson-crabtree

Education

Clemson University

Bachelor of Science in Financial Management, Minor in Accounting
Emphasis in Real Estate
GPA: 3.37/4.00

Clemson, SC
(Aug. 2020 – Dec. 2023)

Work Experience

Brown Edwards Certified Public Accountants

Audit Intern

Bristol, VA
(May 2022 - Aug. 2022)

- Worked on various audits including municipalities and school activity funds
- Traveled to execute compliance testing and journal reconciliations on audits
- Prepared the financial statements for a school activity fund encompassing eleven schools

Crabtree Buick GMC

Accounting Clerk

Bristol, VA
(May 2021 - Aug. 2021)

- Performed a daily cycle of reconciling payables, posting invoices, and cutting checks
- Organized and performed scheduling and documentation of inventories
- Balancing ledgers and executed multiple bank statement reconciliations

Crabtree Buick GMC

Detail and Reconditioning Specialist

Bristol, VA
(May 2020 - Aug. 2020)

- Worked on a timeline to turn poorly kept trade in vehicles into profitable assets
 - Trusted exclusively with the used car departments most challenging projects
 - Improved upon and relied on great attention to detail when reconditioning vehicles
-

Involvement

Delta Sigma Pi, Kappa Tau Chapter

Active Member

Clemson, SC
(Nov. 2020 - Present)

- Developed professional dexterity through a six-week pledging process
- Improve crucial business skills through participation in professional development seminars
- Serve the Clemson area through numerous community service opportunities

Clemson Club Tennis

Treasurer

Clemson, SC
(Sept. 2022 – May 2023)

- Created and manage a budget of roughly \$30,000+ raised by dues and university funding
- Select hotels and reimburse traveling members for tournament expenses
- Reduced expenses allowing the club to supply around 200 members with free t-shirts

Clemson Chick-fil-A Club

Vice President / Treasurer

Clemson, SC
(Jan. 2022 – Present)

- Maintain a strict budget of \$7,000+ to fund catering and events for members
 - Organize monthly meetings, hosting an average of around 100 club members
-

Certifications

Microsoft Office Master Certification

- Received expert level certifications in Microsoft Word, Excel, and PowerPoint to earn the Master Certification

Samuel S. Crane

(571)-317-9014 ♦ sscrane@g.clemson.edu

Education

CLEMSON UNIVERSITY – Clemson, SC- Anticipated Graduation: Spring 2024

- ♦ Bachelor of Science in Financial Management- Emphasis in Real Estate
- ♦ Minor: Legal Studies and Accounting
- ♦ Cumulative GPA: 3.3/4.0

EMPLOYMENT

Truist: Grandbridge Real Estate Capital LLC: Summer Analyst, May 2023- August 2023

- ♦ Assisted teammates through new loan production, sizing, underwriting, closing, and servicing
- ♦ Completed multiple projects and presentations on new loan production and sizing options
- ♦ Understudied teammates to learn about Agency lending and secondary markets

Urbano 116 Mexican Fare: Barback, May 2022- August 2022

- ♦ Maintained communication with bartenders and servers to ensure a positive restaurant experience
- ♦ Performed various duties such as cleaning and clearing bar areas, taking orders, preparing, and serving drinks, and restocking
- ♦ Carrying out opening and closing duties regularly

SureShip Inc.: Inventory and Supply Chain Intern, December 2021- January 2022

- ♦ Conceptualized and co-led an inventory introduction project for a new client with over \$200,000 inventory value
- ♦ Implemented cost-saving strategies to effectively identify, receive, and store new products for clients
- ♦ Gained on-site experience in supply chain operations and insight into productivity optimization plans

Extracurriculars

Beta Theta Pi Executive Council, Internal Social Chair: Fall 2021 - Fall 2022

- ♦ Plan and manage a semi-annual budget of \$15,000-\$19,000
- ♦ Plan and orchestrate intricate events for 200-1000 attendees involving transportation, catering, entertainment, event set-up and break-down and integrating proper risk management planning.
- ♦ Negotiate and execute contracts and agreements with venue operators, music & talent agents, band managers and other vendors and suppliers in support of events

Clemson Real Estate Club: Fall 2022 – Present

- ♦ Attend seminars from various business professionals in the real estate sector
- ♦ Engage in group meetings to discuss new and ongoing topics in real estate

Clemson Finance Club: Fall 2021 - Present

- ♦ Attend and participate in lectures from industry leaders in the financial management space, including discussions on key industry developments and trends and networking with participating businesses and industries

Internship with The Giving Dogs Charity: May 2020 – Aug 2020

- ♦ Charity founded with the mission to give children in low-income areas the opportunity to play hockey through free equipment, ice time, and instruction
- ♦ Organized and supervised outdoor camps, workouts, and practice routines for player development and team building - following COVID-19 safety protocols

Certifications

- ♦ **Fannie Mae University:** Future Housing Leaders Program 2023
- ♦ **Wall Street Prep:** Real Estate Financial Modeling 1-9
- ♦ **LinkedIn:** Excel for Business Analysts, Data Analytics for Students

Alexa Cristinzio

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<https://www.linkedin.com/in/alexa-cristinzio-574b1b236/>
148 Swanhaven Drive

Education

Clemson University, Clemson SC
Bachelor of Science in Financial Management
Emphasis in Real Estate
Minors in Accounting and Computer Science

May 2024

Key Work Experiences

Aspire Bakeries, Cayce SC
Inventory Data Analyst Intern

June 2023-August 2023

- Received shift reports, organized the information through excel to determine how much of inventory was used, distributed the information into SAP to process orders, update inventory, and inform managers how much product has been made.
- Use SAP (Systems Applications and Products in data processing) software to monitor incoming and outgoing inventory.
- Analyzed inventory and waste levels to find inconsistencies and report to shift managers.

Your Pie, Clemson SC

Shift-lead and Team Member (20-40 hours per week)

August 2021-November 2022

- Provide quality services in a fast-paced work environment.
- Managed assigning roles to 8-15 people per shift and oversee that each task is going smoothly and modify positions if needed.
- Train and mentor new employees and work with established employees to improve performance.
- Communicate with customers by guiding them through the restaurant process.

Panera Bread, Lexington SC

Team-member (30-40 hours per week)

May 2021-August 2021

- Open kitchen area and get station organized and prepared for morning and lunch.
 - Prepare customer orders to exact standards and specifications of the customer.
 - Developed and maintained positive working relationships with others to reach business goals.
 - Communicating with co-workers on food orders to make food quickly and accurately for customers in a fast-paced environment.
-

Skills

Technical: Basic understanding of Microsoft Excel (working knowledge), PowerPoint, Experience on both PC's and Macs, Basic understanding of Tableau (working knowledge)

Anna Victoria Croasdale

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4444 Fairfax Ave Dallas, Texas 75205

EDUCATION

Clemson University Honors College **Clemson, SC**
Bachelor of Science in Financial Management & Minors in Spanish Studies, Accounting May 2024

- GPA: 3.96/4.0
- Emphasis: Corporate Finance
- Honors/Activities: President's List (2020-2023), Dean's List (2021), Investment Banking Club - Vice President (2023), Women in Business (2021-2022), Clemson Club Lacrosse (2022-2023), Order of Omega Honors Fraternity (2023), College of Business Student Advisory Board Representative (2023)

WORK EXPERIENCE

Financial Analyst **New York City, NY**
Blackstone June 2023-August 2023

- Provided essential support in preparing financial statements and presentations for potential investors conveying complex financial information in a clear and concise manner
- Involved in evaluating the Blackstone Credit's performance and portfolio investment strategy which included assessing investment risk, identifying growth opportunities and conducting in-depth analyses of financial data

Financial Analyst **Greenville, SC**
Prisma Health- Memorial Hospital May 2022-August 2022

- Assisted team with in-depth financial trend analysis to evaluate revenue, reimbursement and expenses to prepare operating budget spreadsheets for over \$5 billion worth of patient revenue
- Analyzed previous expense data to calculate future costs of housing patients and maintaining full time employees based on hours worked and patient beds

Consultant **Clemson, SC**
Small Business Development Center August 2021-December 2021

- Drew insights from qualitative and quantitative data from startups and produced reports analyzing target markets, demographics, and competition for prospective clients

Business Foundations Course Assistant **Clemson, SC**
Clemson University August 2021-December 2022

- Collaborate with the lead professor to develop course strategies to enhance career and educational development of students in alignment with the curriculum and learning objectives.
- Supported the implementation of a new business foundations track with the addition of two classes

LEADERSHIP EXPERIENCE

Kappa Kappa Gamma Sorority **Clemson, SC**
Vice President of Finance August 2020-Present

- Prepare and manage the chapter annual budget of over \$300,000 while keeping oversight on spending by the chapter while managing budget projections in alignment with current financial strategies

Financial Student Advisory Board **Clemson, SC**
Wilbur O. and Ann Powers School of Business May 2022-Present

- Collaborate with board members, students, and the finance department to enrich academic experience by creating solutions for financial department to implement, such as networking nights, tailoring the finance course track, implementing new classes, and meeting with alumni board members

RELEVANT PROJECTS

Ratio Analysis Project
Finance Honors Project | February 2022

- Interpreted Walmart's balance sheet, cash flow, and income statements to calculate relevant ratios to evaluate firm's success such as debt-to-equity, inventory turnover, price-to-earnings, etc.
- Used data to make comparative analyses to performances of industry competitors

Drake C. Cronthall

212 Pine St. Clemson SC, 29631 - dcronth@g.clemson.edu - (818) 395-7750

EDUCATION

Clemson University, Wilbur O. and Ann Powers College of Business **Clemson, SC**
Bachelor of Science in Financial Management & Accounting May 2024
Emphasis: Banking & Investments
GPA: 3.90/4.00
President's List: Fall 2020 - Spring 2022
Dean's List: Fall 2022, Spring 2023

EMPLOYMENT HISTORY

Andersen Tax **Los Angeles, CA**
Intern, Private Client Tax Services Summer 2023

- Researched and applied relevant tax laws to ensure compliance with tax regulations and maximize tax savings.
- Processed data from personal financial statements into tax software to construct a Form 1040.
- Created presentations for clients, providing tax and financial advice.

HIIT-it **Pasadena, CA**
Operations Assistant Summer, Winter 2021 and Summer 2022

- Assisted in daily operations, including teaching classes, of a boutique fitness studio.
- Formatted and ran social media accounts with the intent to draw and maintain clientele.

LEADERSHIP & SERVICE EXPERIENCE

Scholars of Finance **Clemson, SC**
Chapter Co-Founder, VP of Professional Development 2022 - Present

- Created the foundation for a chapter of a professional finance organization on campus including the recruitment of high level candidates.
- Organize guest speaker events bringing professionals from across the finance industry to discuss a wide range of topics.

Delta Chi Fraternity **Clemson, SC**
Academic Chair November 2021- Present

- Created an academic mentorship program, improving chapter GPA to the top 50% of fraternities while fostering friendship.
- Communicate information regarding scholarships, internships, and academic opportunities to the fraternity.

TreePeople **Los Angeles, CA**
Volunteer Summer 2023

- Renewed depleted landscape, protected indigenous species, and improved public ground across the Los Angeles area.

HONORS, ACTIVITIES, INTERESTS

Honors: Phi Kappa Phi Honors Society, Wells Fargo Student Scholars Endowment
Activities: Clemson Bodybuilding Club, Clemson Golf Club
Interests: Bodybuilding, Powerlifting, Golf, Poker

HENRY CROSS

105 Dickinson Lane
Wilmington, DE 19807

hhcross@clemsun.edu

302.743.0555

OBJECTIVES

To earn a position in the field of finance with special interest in investment banking and financial analysis. To learn as much as possible, develop my skills, and build on my education. To prove myself as a hardworking and valuable employee.

EDUCATION

Clemson University – Wilbur O. and Ann Powers College of Business
Bachelor of Science in Financial Management

Clemson, SC
Class of 2024

- Emphasis: Banking and Investments
- Cumulative GPA: 3.2; Major GPA: 3.8; Dean's List Award
- Extracurriculars: Finance Club, Wall Street South Investment Club
- Certifications: Bloomberg Market Concepts Certificate

WORK EXPERIENCE

Obie's

Bartender, Server

Rehoboth, DE
May 2019 – Aug 2022

- Consistently provided professional, friendly, and engaging service.
- Routinely supported other areas of the restaurant as requested, including answering telephones and completing financial transactions for other staff.
- Maintained complete knowledge of the restaurant menu.
- Strived for absolute customer satisfaction, obtaining multiple positive online reviews for the restaurant.
- Proved myself as a valuable employee and became the youngest bartender with the staff.

Rusty Rudder

Busser, Food Runner

Dewey Beach, DE
May 2017 – Aug 2018

- Facilitated collaboration between the kitchen and wait staff.
- Developed strong customer service skills for interacting with restaurant guests.
- Maintained composure in a fast-paced work environment.

LEADERSHIP

Clemson University Phi Delta Theta SC Gamma
Social Chair

Clemson, SC
Dec 2021 – Jan 2023

- Implemented and lead a committee of 10 people with the goal of raising funding for, organizing, and promoting events to develop relationships with other Greek fraternities and sororities.
- Managed a budget of \$20k and negotiated with other social chairs to raise an additional \$50k+ for events.
- Scheduled daily communication with my social committee and talent booking agencies to meet deadlines.
- Coordinated a school wide charity event that raised \$15k+ for the Live Like Lou Foundation.

Wall Street South Investment Club

- Managed a virtual portfolio of \$100,000.

ADDITIONAL INFORMATION

Skills: Reliable, Quick Learner, Leader, Motivated, Hard Working

Computer: Experience coding in Java, Python, C++, Visual Basic. Proficient in Microsoft Excel, PowerPoint, and the Bloomberg Terminal.

WILLIAM CRUMP

wcrump@g.clemson.edu · (240) 205-6371 · [linkedin.com/in/william-crump-79b2b9241](https://www.linkedin.com/in/william-crump-79b2b9241)

EDUCATION

Clemson University *Bachelor of Science, Financial Management - Emphasis in Financial Planning, Accounting Minor* *Graduation: May 2024*
Overall GPA: 3.40/4.0, Finance GPA: 3.65/4.0

WORK EXPERIENCE

Jeter Hrubala Wealth Strategies – *Private Wealth Management Intern; Spartanburg, SC* *May 2023 - August 2023*

- Conducted investment research on individual stocks, ETFs, and mutual funds
- Assisted in creating model portfolios and analyzed client cash flow needs
- Participated in client meetings providing feedback and insight to the team
- Conducted research in financial services industry trends, new technology, and market influencers
- Attended weekly meetings with the team and presented projects on a variety of topics

Financial Planning Association Externship – *Externship Student; Remote* *May 2023 – July 2023*

- Received training from financial planning experts on client onboarding, investments, insurance, risk management, cash flow, retirement, tax, and estate planning
- Applied financial planning software to real world scenarios
- Observed meetings with certified financial planners and their clients

Chevy Chase Country Club – *Golf Equipment and Outside Operations; Chevy Chase, MD* *May 2022 – August 2022*

- Customer relations and interaction to ensure high quality services and customer experience
- Responsible for maintenance and preparation of golf carts and equipment to meet daily schedules

PROFESSIONAL SKILLS AND CERTIFICATIONS

Professional Licenses: Securities Industries Exam (SIE), August 2023

Financial Software and Research Platforms: Morningstar, FactSet, Asset-Map, eMoney

Financial Skills and Experience: Investment Portfolio Development - research, analysis, trade execution, ongoing management, experience with traditional securities and complex assets such as cryptocurrencies

Technology Skills: Microsoft Office, Google Application Suite, Tableau

LEADERSHIP EXPERIENCE AND ACTIVITIES

Wall Street South Investment Club - Member *January 2023 - Present*

- Gained hands-on experience in trading securities and managing an investment portfolio through the use of a trading simulation featuring stocks, bonds, mutual funds, options, and futures

Pi Kappa Alpha Fraternity, Eta Alpha Chapter - Financial Committee Member *January 2023 - Present*

- Collaborated with fellow committee members to develop and manage the fraternity's annual budget
- Developed spending forecasts and analyzed cash flow requirements

Pi Kappa Alpha Fraternity, Eta Alpha Chapter - Philanthropy Committee Member *January 2021 - December 2021*

- Planned and executed numerous fundraising events and coordinated with charitable organizations
- Aided in raising over eight thousand dollars for First Responders Children's Foundation

HONORS (Clemson University)

Dean's List

Fall 2022

Christopher Cummins

2 Egret Circle, York, ME 03909

cscummi@clemson.edu • 207-351-6330 • www.linkedin.com/in/christopher-s-cummins

EDUCATION

Clemson University, Clemson, SC

December 2023

Bachelor of Science in Financial Management

Minor in Accounting: Emphasis in Corporate Finance

SUMMARY: I am a current student graduating this December. My work experience highlights skills, including effective communication, attention to detail, and team collaboration. I am an avid learner looking for a workplace that will allow me to do so.

EXPERIENCE

Valet/Bellman, The Cliff House, Cape Neddick, Maine

May 2022 – August 2023

- Welcomed guests into the 4-star hotel with particular attention to their needs
- Provided excellent customer service to guests by listening and giving recommendations to ensure a memorable experience
- Developed teamwork skills by assessing certain situations and putting my coworkers and me in a position to succeed

Pro Shop Attendant, York Golf and Tennis, York, Maine

April 2016 – November 2021

- Managed outdoor operations to ensure members and the golf course ran smoothly
- Developed relationship-building skills by interacting with members daily
- Honed in communication skills by interacting with a variety of different people daily

CLUBS & CERTIFICATIONS

Wall Street South Investment Club, Clemson University

Fall 2022 - Present

- Participated in portfolio simulation, handling a \$100,000 portfolio by trading in the stock market

Finance Club, Clemson University

Fall 2022 - Present

- Developed professional competencies with other finance majors and learned networking skills

-Networking for Sales Professionals Certification, LinkedIn

-B2B Sales Foundation, LinkedIn

-Bloomberg Market Concepts Certification, Bloomberg

-Cold Calling: The First Seven Seconds, LinkedIn

-Salesforce: Sales Automation for Salespeople, LinkedIn

RELEVANT COURSEWORK & SKILLS

- Analytics for Accounting Decision: Learned to create value by addressing fundamental business and accounting questions using data analytics.
- Corporate Financial Analysis: Explored the potential needs of financial statement end users (e.g., managers, investors, creditors) for their various investment and financing decisions.
- Technical Skills: Microsoft Office Tools (Excel, Word, PowerPoint), Power Query, Tableau, Salesforce
- Soft Skills: Attention to detail, Customer service, Collaboration, Communication

Jack P. Cunningham

153 ½ South Street, Manasquan, NJ 08736 | jc102501@gmail.com | (732) -991-8769

LinkedIn: <https://www.linkedin.com/in/jack-cunningham1025/>

EDUCATION

Clemson University, College of Business

Bachelor of Science in Financial Management

Minor: Accounting, Emphasis: Banking & Investing

Clemson, SC

May 2024

PROFESSIONAL EXPERIENCE

Denholtz Properties

Accounting Summer Internship

Red Bank, NJ

May 2023 – Aug 2023

- Interned with the accounting department and shadowed others, including asset management, construction, operations, and acquisitions to gain a comprehensive view of the industry.
- Completed a variety projects, including preparing month and quarter end lender packages, inclusive of a complete set of financial statements, leasing updates and accounting supporting schedules, worked with budgets, and handled tax information.
- Attended several meetings with multiple departments and toured operating and in-development properties to gain real-world exposure to the day-to-day activities of real estate professionals.
- Substantially increased proficiency in Excel, and gained working knowledge in platforms such as Yardi, CoStar, and VTS for data retrieval and report generation.

Jimmy's Cucina

Delivery Driver

Brielle, NJ

May 2022- August 2023

- Demonstrated strong problem-solving and time-management ability by delivering meals and large catering orders to over 7 towns on the New Jersey shore.
- Led inventory management, trained new employees, and assisted in customer service problems.
- Developed an unwavering work ethic and a commitment to ensure customer satisfaction in a tip-based industry, recognizing the significance of hustling to deliver unparalleled service every day.

LEADERSHIP/ INVOLVEMENT

Wall Street South Investment Club

Member

Clemson University

August 2022- Present

- Participate in an investing club with Clemson University upperclassmen who are interested in a career in finance to learn new skills and meet professionals in the field.
- Utilize resources of the Clemson finance department, such as Bloomberg terminals and trading simulations to assist in decision-making.
- Build connections with students in pursuit of similar career paths to develop a professional network.

Real Estate Club

Member

Clemson University

January 2022- Present

- Attend weekly meetings and lectures run by real estate professionals and firms located in the southeast.
- Given the opportunity to speak with successful real estate professionals from a wide variety of emphasis areas and grow my network.
- Selected as one of thirty students to complete Costar's certification program this semester through the club.

Blockchain Club

Member

Clemson University

August 2022- Present

- Collaborate with students with an interest in cryptocurrency and all areas of blockchain systems.
- Attend monthly meetings and discuss multiple aspects of the growing and rapidly evolving industry with students, instructors, and professionals.

SKILLS/ INTERESTS

Skills: Microsoft Office, Financial Modeling & Analysis, Tableau, Bloomberg Terminals, Yardi, VTS, Costar

Certifications: Financial Modeling with Excel (CFI), Bloomberg Market Concepts

Hobbies/ Interests: Movies, Weightlifting, Football, Skydiving, History

John Davison

Clemson, SC | 847.444.9164 | daviso4@g.clemson.edu

Education

Clemson University, College of Business
Bachelor of Science in Financial Management
Minor: Accounting, Emphasis: Corporate Finance
Major GPA: 3.5/4.0

Clemson, SC.
May 2024

Experience

Heinen's Grocery | Cashier 2017-19 | Front-End Manager 2019-21

Bannockburn, IL
2017-2021

- Supervised employees and assessed performances to determine training needs and defined accurate plans for decreasing process lags.
- Introduced higher standards for customer service and increased efficiency by streamlining operations.
- Created and Organized schedules for over 25 employees.
- Researched and corrected customer concerns to promote company loyalty.

Bari Manufacturing | Restaurant Manager | Plant Production Manager

Seneca, SC.
2020-Present

- Was responsible for large and diverse staffs of various sizes.
- Monitored cash intake and deposit records, increasing accuracy and reducing discrepancies.
- Strengthened merchandising and promotional strategies to drive customer engagement and boost sales.
- Increased employee performance and job satisfaction to strengthen retention and engagement.
- Made hiring recommendations to increase company's productivity and profitability with quality workers.
- Managed the fulfillment of large production orders to supply regional SYSCO warehouses with product.

Activities, Awards, and Interests

Activities: Wall Street South Investment Club, Finance Club, National Society of Collegiate Scholars

Awards: Clemson Dean's List

Interests: Financial news, Reading, Golf

Skills & abilities

- Proficient in the use of Microsoft Excel
- Proficient in the use of Intuit QuickBooks
- Management & working with others
- Leadership in a variety of diverse groups and settings

Jacob Delgado

6 Walnut Court, Moorestown, NJ 08057
jacobdelgadonj@gmail.com | (856) 952-7307

EDUCATION

Bachelor of Science in Financial Management May 2024
Clemson University, Clemson, SC GPA: 2.95/4.0
Emphasis: Corporate Finance, Minor: Accounting

Academic Achievements

- Dean's List: GPA of 3.5+ Fall 2020, Spring 2021

WORK EXPERIENCE

Chief Operating Officer, Bird's Eye Photography LLC, Clemson, SC Jul 2023-Present

- Created a start-up company
- Create a business plan
- Film, edit and sell media to a broad and diverse client base. Our target audience consists of real estate agents, construction companies, golf courses, and athletes
- Build a strong online presence to promote the brand with the creation of a website and frequent posting on social media

Accounts Payable Intern, Riverton Country Club, Riverton, NJ Jun-Aug 2023

- Keep financial information up to date and accurately accounted
- Learned the process to remain ahead of schedule of the daily data entries. Consists of sending notices to those with outstanding balance, fixing prior incorrect entries, and recording new entries

Merchandise, Scotts Miracle Gro, Clemson, SC Mar 2022-May 2023

- Working within ten Lowes and Home-Depots in the South Carolina area
- Execute merchandising directives and re-sets to place products in a strategic area in attempt to acquire more sales
- Recruited two members who also worked in the South Carolina area

LEADERSHIP

Wall Street South Investment Club Member, Clemson, SC Sept 2022-Present

- Participant in Clemson University's, StockTrak competition with a total of 193 Financial Management students
- Built an ongoing portfolio over the course of seven months where I achieved 25.71% portfolio returns and finished 3rd overall
- Broad working knowledge of financial instruments and strategies, such as equities, options, futures, bonds, mutual funds, and diversification

Head Counselor, Camp Netop, Casco, Maine Jun 2021-Aug 2022

- Trained and mentored new counselors (ages 16-30, across 15 countries) on how to lead group activities, helped drive positive outcomes for camper conflicts/issues, and created a high-performing team within a positive and collaborative work environment
- Fostered an environment that supports the Netop objective of building "Character, Confidence, & Friendships"
- Lead resolution efforts for unresolved issues escalated to Head Counselor, as well as more complex and sensitive issues, e.g. difficulty adjusting to an unfamiliar environment and/or culture, mental health struggles, or loss of a family member
- Worked cross functionally with other counselors, supervisors, owners, and kitchen staff, using communications, role assignments, counselor training, and program monitoring. Together we would create daily events for 150+ participants

Ethan Dent

emdent@g.clemson.edu | 101 Tall Oaks Ct. Easley, South Carolina 29642 | (864) 650-6654.

Education

Clemson University, College of Business

*Bachelor of Science in Financial Management
Minor in Accounting, Emphasis in Real Estate
Member of the Clemson University Finance Club
South Carolina Life Scholarship Recipient*

Clemson, SC

May 2024

Employment History

Clemson University

Head Peer Leader

Clemson, SC

Summer of 2022 and 2023

- As the Head Peer Leader with Clemson's Summer Start program, I was in charge of a team of 15 Peer Leaders. We mentored, planned, and led events throughout the program for 500 students. Each Peer Leader was responsible for a group of 40 students, where we were in charge of getting them better adapted to college life at Clemson.

Ingles Markets Inc.

Bookkeeper

Powdersville, SC

September 2020 - August 2023

- As a bookkeeper I was in charge of monitoring and managing all of the cash coming in and out of the store on a daily basis. Along with this I would develop and provide the documents needed by the banks and corporate to show the store's transaction history and cash flow.
- I was also in charge of leading the front end staff, which consisted of 40 workers.

Clemson University

Research Assistant

Clemson, SC

February 2021-April 2021

- Reviewed and transferred data from research documents into Excel so that the head researchers could more easily and efficiently analyze the data.

The Wash Doctors

Co-Founder

Powdersville, SC

Summer of 2022

- Helped found and run a power washing company with two of my friends the summer before college
 - Washed houses and driveways all over the Upstate and gained valuable sales experience
-

Skills

- **Proficient in Google applications and Microsoft Excel**
- **Experience in Sales, Data Entry, Management, and Accounting**
- **Leadership experience with teams both large and small**
- **Experience working with Bloomberg Terminals**

Stuart Derrick

843-476-5689 | stuard0522@gmail.com | Beaufort, SC 29907

EDUCATION

Clemson University, College of Business
Bachelor of Science in Financial Management

Clemson, SC
May 2024

WORK EXPERIENCE

Accounts Manager, Derrick Ballet Conservatory, May 2023-Present

Beaufort, SC

- Navigated quickbooks with the present office manager, connecting bank accounts and printing checks.
- Created and revised emails sent to customers on Jackrabbit software.
- Set up employee accounts on surepayroll, a mobile deposit program.
- Worked on excel creating pivot tables.

Account Manager, Bundy Appraisal and Management Inc., May 2022-July 2022

Beaufort, SC

- Built and maintained productive relationships with customers and internal partners.
- Reconciled bank accounts.
- Helped with the payments, customer service and requests of HOA members.
- Went to weekly on-site inspections.

Office Assistant, Derrick Ballet Conservatory, May 2021-August 2021

Beaufort, SC

Delivery Driver, Upper Crust, September 2018-August 2020

Beaufort, SC

ACTIVITIES

Basketball student manager, Oct 2021 - Apr 2022

- Worked closely with the video coordinator filming all practices and home games.
- Coded games for film which the team used to study an opponent.
- Worked 6 days a week filming practice
- Was requested for after practice coding or off day individual player workouts.

INTERNATIONAL TRAVEL

Bahamas, Brasil, Canada, Costa Rica, Portugal, Spain, Turks & Caicos, UK

Rish Desai

Charleston, SC 29445 • rishd@clemson.edu • +18434424771

Education

CLEMSON UNIVERSITY

Bachelor of Science **Financial Management**
Minor in **Accounting**, Emphasis in **Real Estate**

Clemson, SC
May 2024

Experience

Berry Global Inc.

Sales Intern

Charlotte, NC
May 2023 – August 2023

- Conceptualized and developed a comprehensive onboarding tool, creating a seamless integration of a new key account lead into the team.
- Formulated elevator pitches to convey the company's value propositions, effectively capturing potential clients' attention and interest.
- Designed and implemented a program tracker that empowers key account leads to monitor weekly customer purchases, yielding real-time insights for strategic decision-making.
- Created a product sample book, providing the company with an up-to-date market analysis encompassing pricing, branding, and product differentiators.

D&D Accounting Firm

Audit Intern

Charleston, SC
May 2022 – August 2022

- Helped clients navigate interactions with tax authorities with legal concerns related to financial matters.
- Completed daily cash functions such as, account tracking, payroll, sales tax, and bookkeeping.
- Performed month-end reconciliations of accounting records to resolve discrepancies and to ensure compliance.

The Montford Group

Intern

Charleston, SC
June 2021 – August 2021

- Engaged in a market analysis and integrated market strategies into new acquisitions, contributing to informed decisions
- Oversaw daily operations within a prominent Charleston-based real estate development firm, ensuring seamless efficiency and excellence.
- Shadowed and actively participated in client meetings and intricate business negotiations, gaining firsthand insights into sophisticated deal-making processes.

Leadership & Involvement

Sales Innovation Program

Member

Clemson, SC
January 2023 – Present

- Attend networking nights with industry partners to learn more about the sales industry.
- Access to coursework where students partake in real-world challenges, foundational role-play exercises, and leadership opportunities.

Alpha Sigma Phi

Scholarship Director

Clemson, SC
January 2022 – January 2023

- Mentored new members by holding daily meetings with new members that allow them to further their academic career. Assisting with classes, campus involvement, and personal life.
- Hosted a LinkedIn and Resume building workshop with new members to assist with professional development.

Clemson Kicks

Founder

Remote
Aug 2019 – Aug 2022

- Developed company from the ground up, creating a business plan, implementing operations strategies, and overseeing day to day operations.
- Researched market trends that prioritized resell and bulk sales by providing fair margins to customers that consistently grew orders and revenue.
- Performed thorough market research and complete analysis to understand and effectively communicate product value proposition.

Skills

Technical: MATLAB, Microsoft Word and Excel, AUTOCAD, QuickBooks

Other Involvement: Sales Club, Real Estate Club, Indian Cultural Association, New Member Mentor Program

Ralph A. DeSevo

(732)-332-8978 | rdesevo@clemson.edu

EDUCATION

Clemson University

Bachelor of Science in Financial Management
Corporate Finance Emphasis, Accounting Minor
Cumulative GPA 3.2/4.0

Clemson, South Carolina
Expected Graduation: May 2024

WORK EXPERIENCE

Lincroft Luigi's

Store Manager
Assistant Store Manager
Ordertaker/Counter

Lincroft, NJ

June 2021–August 2022

May 2020–June 2021

January 2018–May 2020

- Responsible for opening/closing store, nightly register count, employee training, creating employee schedule, and writing checks to vendors
- Managed team of 10+ employees across kitchen, register, drivers, and ordertakers
- Handled all customer service-related matters

Dow Jones

Purchasing Intern

Princeton, NJ

June 2023–August 2023

- Worked in a hybrid setting for 10 weeks between the Princeton and New York City offices
- Worked on project with two other interns on unlocking efficiency and process automation
- Covered for analyst on paternity leave
- Reviewed and approved purchase requests through SAP and helped business partners pay vendors in a timely manner

Part-Time Purchasing Analyst

August 2023–Present

- Asked to return part-time while still enrolled at Clemson University
- Entrusted with more responsibility by taking on new business partners into my group
- Started to work closely with other teams under the Global Finance Department

LEADERHIP

Delta Chi Fraternity

Risk Management Officer

Clemson, SC

November 2021–November 2022

- Responsible for ensuring that our organization follows all guidelines established by Clemson University and Nationals
- Managed internal and external conflicts between members and other organizations
- Held members accountable for their actions and enforced consequences when necessary

Scholars of Finance

VP of Finance and Operations

Clemson, SC

November 2021–Present

- Responsible for budget creation and supervising chapter's finances
- Manage chapter's roster and validate member's status with National
- Meet with a different financial leader in a variety of career paths

SKILLS AND INTEREST

- Seal of Biliteracy in Spanish
- Experience in Bloomberg Terminal, Microsoft Excel, and SAP
- Interests: Golf, Fitness, and Journaling

Liz Dillard

cedilla@clermson.edu | 864-361-7710 | [linkedin.com/in/caroldillard222](https://www.linkedin.com/in/caroldillard222)

Innovative critical thinker seeking entry-level analyst or consulting position leveraging my interpersonal and leadership skills, passion for continuous growth, and attention to detail.

EDUCATION

Clemson University Honors College Clemson, SC
Bachelor of Science in Financial Management *Aug 2020-May 2024*
Concentration in Corporate Finance
Minor in Accounting
GPA: 3.73/4.0

Programme at University of Oxford Oxford, England
Clemson Business Study Abroad: Oxford Programme *June-Aug 2022*

WORK EXPERIENCE

Truist Securities Atlanta, GA
Investment Banking Summer Analyst, Credit Delivery, Financial Institutions Group *Summer 2023*

- Performed extensive due diligence to complete annual reviews
- Analyzed the company's historical performance, industry, risks and mitigants, covenant compliance, and equity research
- Created financial models to project 7-year company performance

Starbucks Corporation Inman & Clemson, SC
Shift Supervisor *Sept 2019-Pres.*

- Communicates effectively with customers and manages a diverse group of 10+ employees
- Effectively multitasks and works well in a fast-paced environment
- Balances 20 hours per week with academics and extracurricular involvement

EUREKA! Undergraduate Research Program, Clemson University Clemson, SC
Head Counselor *Feb 2021-Aug 2021*

- Managed 2 other counselors; created, organized, and promoted itinerary for a 5-week research program for 36 select freshmen
- Itinerary included 35 social events, time for research, and networking opportunities with 12 guest speakers
- Completed economics research project with Dr. Miren Ivankovic and presented data at the EUREKA! poster forum

LEADERSHIP EXPERIENCE

Financial Management Association Clemson, SC
President *Aug 2023- Pres.*

- Founded Clemson's chapter of the Financial Management Association
- Mission: To provide a fully integrated program that combines education, career preparation, industry intellectual capital, and alumni engagement to prepare students for careers in financial services

Real Estate Club Clemson, SC
Upstate CREW Liaison *April 2023-Pres.*

- Served as the liaison between Clemson's Real Estate Club and the Greenville chapter of the CREW Network
- Coordinated on-campus events with CREW for students

Global Business Ambassador, Clemson University Clemson, SC
Ambassador *Aug 2022-Pres.*

- Created and managed information sessions for the Oxford study abroad program
- Hosted quarterly study abroad panels for prospective study abroad students

NOTABLE COURSEWORK

- Deloitte Managerial Consulting; Deloitte Consulting Case Competition- Spring 2023
- Consulting Leadership
- Business Analytics

HONORS AND AWARDS

- 2023 CREW Network Foundation Scholarship Recipient
- Palmetto Fellows Scholarship, Clemson Palmetto Pact Scholarship, Joyce M. Weldon Scholarship
- AFS Global Competence Certificate
- Girl Scout Gold Award

ADDITIONAL INFORMATION AND INTERESTS

- Experience with financial modeling and Bloomberg machine. Proficient in Excel and PowerPoint. Exposure to Alteryx and PowerBI.
- Oboist; Travel; Personal Fitness; Personal Investments; Hiking; Animal Rescue

JESSICA DIONIAN

203-571-8786

Clemson, SC

jdionia@clemson.edu

EDUCATION

Clemson University, Wilbur O. and Ann Powers College of Business

Clemson, SC

Bachelor of Science in Financial Management, Minor: Accounting, Emphasis: Financial Planning

May 2024

Cumulative GPA: 3.35/4

WORK EXPERIENCE

UBS

Westport, CT

Global Wealth Management Intern

Summer 2023

- Conducted research via Morningstar and Refinitiv platforms on mutual funds, fixed income securities, individual stocks, alternative investments, and separate accounts
- Participated in meetings with the team, clients, and external wholesalers selling their investment products
- Utilized Excel daily to analyze performance metrics and store client information
- Gained exposure to financial planning platform and provided administrative support to the team

Northwestern Mutual

Stamford, CT

Financial Representative Intern

Summer 2022

- Obtained CT Life, Accident, and Health Insurance License
- Prospected and built clientele, sold insurance portfolios, created financial plans for clients via PX platform
- Top intern in the Stamford branch, invited to and attended Annual Meeting at headquarters in Milwaukee, WI

Clemson University

Clemson, SC

Marketing Intern for the University Professional Internship and Co-op Program (UPIC)

January 2022 - Present

- Create the monthly UPIC Newsletter and office marketing materials for campus distribution/social media pages
- Assist with the planning/execution of UPIC Intern Orientation and mentor programs
- Participate in team meetings and collaborative decision making
- Maintain office records and provide general office support/assistance in collaboration with professional office staff

Peter's Market

Weston, CT

Hiring Manager

August 2018 - August 2020

- Supervised over 30 employees, created weekly schedules, hired/fired employees, reviewed inventory, supported customer satisfaction, resolved conflicts

EBH Interiors, LLC

Weston, CT

Summer Intern

Summer 2021

- Organized files, consulted on design process, assisted with company website and social media platforms.

LEADERSHIP, INVOLVEMENT, AND SKILLS

Alpha Chi Omega Sorority

Clemson, SC

Assistant Vice President of Finance

December 2021 - December 2022

- Helped maintain the chapter's budget, ensured that chapter rules and regulations pertaining to finance were enforced, assisted with billing and clothing orders, and served as a liaison to other chapter committees as needed
- After passing position along to another member, I currently still am an active member of the chapter

Clemson's Division of External Affairs Industry Advisory Board Meeting

Clemson, SC

Student Panelist

February 2023

- Selected by faculty to present/field questions to 19 C-Suite industry leaders, Clemson University President, and Provost.

Clemson Finance Club

Clemson, SC

Active Member

August 2023 - Present

Skills: Accounting, Excel, Bloomberg, Microsoft Office, Adobe Creative Cloud

Mia Di Paolo

85 Ponsbury Road, Mount Pleasant, SC 29464 ▪ miagracedipaolo@gmail.com ▪ 856-495-6088

EDUCATION

Clemson University

Bachelor of Science Degree in Financial Management
Minor in Accounting, Emphasis in Corporate Finance
GPA: 3.51/4.0

Clemson, SC
December 2023

Academic Achievements: Dean's List, Fall 2021

Certifications: Pursuing Securities Industry Essentials (August 2023) and Adventis Financial Modeling Certification

PROFESSIONAL EXPERIENCE

J.P Morgan

Advisors Analyst Program - Summer Analyst

New York, NY
June 2023 – August 2023

- Developed holistic “Wealth Plans” custom to ultra-high-net-worth clients, to protect, manage, and grow wealth
- Assisted in client reviews, account management, and prospecting utilizing J.P. Morgan software and Salesforce
- Fulfilled a self-led database administration (groupings) project to advance business development
- Worked under The GGC Group – recognized by Forbes, Barron's, and Financial Times (\$1.5 billion in managed assets)
- Completed training and collaborative case study projects, scoring among top interns on the Investment Essentials exam

Goldman Sachs Group

Sophomore Summer Virtual Insight Series

New York, NY
June 2022 – July 2022

- Performed financial market exercises to increase knowledge of industry and organization
- Developed insight on day-to-day role, function, and tools of investment bankers
- Increased technical research and analysis skills through enhanced relationships with bankers

Charleston Food Group

Charleston, SC

Social Media Owner

March 2017 – Present

- Self-directed this entrepreneurial marketing endeavor
- Delivered targeted social media messages through photography and editorial copy across multiple platforms/apps
- Worked with local businesses as well as global consumer chains including 7/11 Corporation

Charleston Winter Sports Club

President and Founder

Charleston, SC
October 2017 – June 2020

- Planned and managed annual event including collection and budgeting funds of over \$17,000
- Executed the event in an efficient and effective manner utilizing spreadsheet skills for financial organization

LEADERSHIP EXPERIENCE & INVOLVEMENT

Investment Research Club, Director of Internal Relations

- Utilized Microsoft Office applications to analyze corporate financial data and facilitate club investment decisions

Investment Banking Club

- Collaborated to encourage and educate like-minded peers as we pursue careers in finance

Women in Business Club

- Attended speaker series, workshops, networking events, and other targeted activities to advance as a female professional

Personal Family Assistant

- Successfully marketed myself and gained this position managing key components of employer's lifestyle and business

ADDITIONAL INFORMATION

Technical Skills: Microsoft Office, Google Workspace, Salesforce

Interests: Surfing, Golf, Stock Market, Clemson LIFE, New York Yankees, Dirt Bikes, Traveling, Fitness & Wellness

Cameron Dixon

Greenville, SC | Clemson, SC

(864)-918-0755 | camerondixon21@gmail.com | LinkedIn- Cameron Dixon

EDUCATION

Clemson University - Wilbur O. and Anne Powers College of Business

Bachelor of Science in Financial Management

Minor: Accounting and Economics, Emphasis: Corporate Finance

- Cumulative GPA: 3.51/4.0 Major GPA: 3.6/4.0

Clemson, SC

May 2024

WORK EXPERIENCE

Elliott Davis, LLC

Accounting Advisory Services Consulting Intern

- Provided CFO services for firm clients
- Reconciled Bank Accounts and Credit Card Statements for clients on QuickBooks
- Prepared and presented Financial Statements on QuickBooks
- Tied statements to reconciliations for clients
- Gathered and transformed raw data into tables, graphs, and charts

Greenville, SC

June-Aug 2023

Southern First Bank

Banking Intern

- Performed Deposit Operations
- Reconciled Bank Accounts on Horizon XE Software
- Shadowed Mortgage Executives, Corporate Lenders, and Executive Team

Greenville, SC

June-Aug 2022

Clemson Eye

Data Analyst

- Part of Business Development team whose goal to merge with other practices
- Gathered data on competing Southeastern Ophthalmology practices
- Entered data into Salesforce

Greenville, SC

2021-2022 School Year

Thornblade Club

Golf Staff

- Managed tee sheets, driving range, golf cart maintenance and storage
- Accommodated member needs

Greenville, SC

May-August 2021

Vector Marketing

Sales Associate

- Marketed and sold Cutco products through face to face and virtual appointments

Greenville, SC

May-August 2020

ACTIVITIES

Wall Street South Investment Club Executive Board Member

- Discuss current events and evaluate market and economic trends
- Plan and organize meetings with guest speakers to share business experiences and answer questions
- Participate in a competitive stock market simulation

Kappa Alpha Order Fraternity

- Member of the Delta Omicron Chapter at Clemson University

First Presbyterian Church Mission Trips

- Participated in mission trips to La Romana, Dominican Republic and Dungannon, Virginia

AWARDS & ACHIEVEMENTS

- **Bloomberg Market Concepts Certification**
- **Dean's List:** Fall 2020, Fall 2021, Spring 2023

ADDITIONAL SKILLS & INTERESTS

Skills: Microsoft Excel, Microsoft PowerPoint, Microsoft Word, Salesforce, QuickBooks, Bloomberg

Interests: Finance and Investing, Clemson Football, Golf, Travel & Outdoors

Kevin Drazba

1343 Saddlebrook Rd. Bartlett, IL 60103 • kjdrzb@g.clemson.edu • 630-465-2796

Education

Clemson University

Bachelor of Science in Financial Management

Minors: Accounting & Management, Emphasis: Corporate Finance

Clemson, SC

December 2023

Work Experience

ICON Management (Troon Golf)

Budget Analyst Intern

Bradenton, FL

Summer 2023

- Lead budget meetings with General Manager of Amenity Association to create property budget
- Analyzed invoices, financial statements, and prior year budgets to support budgeting process
- Projected revenues for ICON's properties to send to Troon corporate
- Generated budgets with supporting details using Oracle software for client presentations
- Learned excel macros to generate payroll reports for each property
- Created budget templates in excel for various property owners' associations
- Assisted in pro-forma analysis using comparable properties

EGC Enterprises

Supply Chain Intern

Chardon, OH

Summer 2021

- Lead special project to organize thousands of dollars of inventory so it could be used in operations and streamline efficiency
- Volunteered to work on new product development with R&D to test a graphite seal for use in valves in nuclear, oil, and gas plants
- Organized list of stocked out items in Sage inventory management software and Excel
- Generated and placed purchase orders from this list by entering vendor number, required ship date, ship method, and customer specific information
- Created work tickets that were used in production and communicated with Engineering to ensure the work tickets were properly updated

Walmart

Sales Associate

Elk Grove Village, IL

Summer 2020

- Displayed flexibility by working in any department as needed to meet customer and store needs.
- Politely and accurately answered any questions customers asked me concerning items, returns, or services
- Helped resolve customer complaints and negotiated price reductions on damaged goods

Classwork

- Created models to calculate various metrics using real financial statement data.
- Learned capital budgeting techniques using IRR, NPV, and XNPV functions
- Created amortization tables for various types of loans and mortgages
- Compared cash flows to decide whether to purchase or lease assets
- Knowledge of GAAP and Cost Accounting Standards

Extracurriculars

- Finance Club
- Adventis DCF/LBO Bootcamp
- Wall Street South Club
- Social Chair for Psi Upsilon Fraternity
- Clemson Club Volleyball
- SCUBA Club

Jarod C. Drudge

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www.linkedin.com/in/jaroddrudge

EDUCATION

Bachelor of Science in Financial Management

Clemson University

Minor: Accounting

Emphasis: Financial Planning

Associates in University Studies

Tri-County Technical College

Emphasis: Pre-Business Program

May 2024
Clemson, SC

Dec. 2020
Pendleton, SC
3.01 GPA

RELEVANT EXPERIENCE

Practice Administration Manager

Jan. 2023 - Present

Equitable Advisors

Greenville, SC

- Manage and monitor the book of business, calendar, and client protocols of Equitable Advisor, Bray Friar
- Integrate effective and efficient systems of retirement, advisory, and brokerage accounts
- Evaluate reports and documents for clients in Salesforce, LPL brokerage software, and DocuSign

Tax Accounting Intern

Jan. 2023 - April 2023

Suggs Johnson LLC

Anderson, SC

- Prepared tax returns for various S-corporations, partnerships, and individual clients
- Estimated costs and tax liabilities using various tax software in CCH Axcess, Engagement, and SurePrep
- Researched tax code fundamentals and tax law for unique situations to improve the quality of services

Life Insurance Field Underwriter

Apr. 2019 - May 2021

Triumph Agency LLC

Anderson, SC

- Processed and submitted applications for selected life insurance and annuity products
- Educated potential clientele in selecting qualified plans and updating policies
- Trained new agents on Customer Relations Management (CRM) strategies and sales procedures

WORK EXPERIENCE

Restaurant Server

Sept. 2021 - July 2022

Cracker Barrel Old Country Store

Anderson, SC

- Provided quality customer service in a fast-paced environment (at least 5 tables per hour)
- Communicated thorough knowledge of menu promotions and beverages to enhance the guest experience
- Trained 3 new staff members on restaurant procedures and quality assurance in interacting with guests

Ministry Development Intern

May 2021 - Aug. 2021

Grace Church

Greenville, SC

- Enhanced guest experience through audio/visual aid and worship leadership
- Facilitated weekend services by identifying technical issues and leading volunteer teams

HONORS & ACTIVITIES

Clemson University Wall Street South Club Member

Aug. 2022 - Apr. 2023

- Managed paper trades and securities for educational purposes
- Attend networking events and received hands-on training in equity options for stock trading

T.L. Hanna High School Honor Graduate

June 2019

South Carolina Palmetto Boys State Participant

June 2018

TECHNICAL SKILLS

Bloomberg Analytics – *Proficient*

Microsoft Office – *Proficient*

Tax Research – *Intermediate*

ROBERT J. DUMAIS

205 Alder Road Westwood, MA 02090
(339) 226-1593
dumaisrobby@gmail.com

EDUCATION

CLEMSON UNIVERSITY, Wilbur O. and Ann Powers College of Business
Bachelor of Science in Financial Management, Minor Accounting
CEA CAPA EDUCATION ABROAD, Barcelona, Spain

May, 2024
3.63 / 4 GPA
Spring 2023

EXPERIENCE

BAYSTATE FINANCIAL

Boston, MA
Summer 2023

Financial Services Representative

Leveraged strong interpersonal skills in actively soliciting new investment and insurance clients using extensive sales and customer service training.

Worked closely with an experienced team of senior financial advisors in the preparation, presentation, and follow up on client meetings, including entry of client-related information and financial data into planning software, providing related financial data analysis, and recommending suitable investment strategies while maximizing client full financial planning.

Demonstrated a strong commitment to ongoing professional development by attending daily internal training sessions and internal company update meetings.

Achieved life insurance state certification and top ranking in summer intern class.

SUBARU OF NEW ENGLAND

Norwood, MA

Parts Distribution Associate

December 2021 & Summer 2022

Accurately and efficiently facilitated the receipt, allocation, picking, and distribution of daily parts orders to the 64 franchised Subaru retailers located throughout New England.

Ensured maintenance of shipping routes and supply chain operations through coordination with the management team and delivery specialist using warehouse systems.

Collaborated with inventory specialists to keep products replenished, organized, and ready for delivery.

Trusted to operate a forklift to move large quantities of car parts to appropriate locations.

PRO AMBITION HOCKEY, INC

New England

Ice Hockey Instructor and Counselor

Summer 2022

Successfully created and enforced daily plans while adjusting to unexpected campers' needs.

Supervised campers throughout the day ensuring the kids were happy and safe both on and off the ice.

Ensured that campers gained a better knowledge of the hockey game while maintain an enjoyable experience.

Traveled around New England to a new city each week learning how to properly manage time while in hotels and on the road.

Responsible for interacting with parents and for completing written camper performance reviews that were shared with campers and their parents.

TWO MEN AND A TRUCK

Foxboro, MA

Professional Mover; Assistant to the Lead Mover

Summer 2021

WOODLAND COUNTRY CLUB

Auburndale, MA

Double Bag Golf Caddy

Summers 2018 to 2023

HONORS AND ACTIVITIES

Clemson University President's List

Fall 2021

Clemson University Dean's List

Spring 2021 - Present

Member of Phi Delta Theta

Spring 2021-Present

TECHNICAL SKILLS Proficient in Microsoft Office

OTHER SKILLS Forklift Certified, Hunter Safety Certified, Boater's Education Certified, CPR Certified

INTERESTS International Travel, Playing Sports including Hockey and Golf, Boston Sports Teams,

Anthony J. DuMond

adumond@clemson.edu • (716) 548-4300 • www.linkedin.com/in/anthony-dumond

EDUCATION

Bachelor of Science in Financial Management

Clemson University, Clemson, SC

Minor: Accounting

Emphasis: Banking and Investments

GPA: 3.46/4.00

May 2024

RELATED EXPERIENCE

West Herr Automotive Group, Buffalo, New York

Accounting Intern

Summer 2023

- Prepared journal entries while participating in cash management functions.
- Assisted with month-end financial reporting, data entry, internal audits, accounts payable, and accounts receivable.
- Managed the monthly tracking of physical inventory, supported the payment processing team, and completed bank statement and balance sheet reconciliations.

The Home Depot, Seneca, South Carolina

Customer Service Associate

Spring 2023

- Assisted guests in every manner including questions about item availability, online order statuses, Penske truck rentals, tool rentals, and much more.
- Processed returns, account payments, and order pickups through the register, as well as normal checkouts to alleviate long lines at registers whenever necessary.
- Contacted departments individually and made overhead dispatches for store meetings, loading assistance, return pickups, and customers needing a hand.

Hoak's Restaurant, Hamburg, New York

Host, Busser, and Food service worker

Summer 2016 – Summer 2019

- Provided excellent customer service as the introduction and farewell to each customer's individual experience as a host.
- Assigned special duties to bussers in day-to-day operations in order to go above and beyond in our service.
- Trained many new bussers and hosts in the required duties of the job, as well as taught customer service skills to enhance the experience of each customer.

OTHER EXPERIENCE

Orchard Park Youth Court, Orchard Park, New York

Member

Fall 2017 – Spring 2020

- Provided advice and guidance to first-time juvenile offenders from a perspective other than a figure of authority
- Trained by local attorneys, judges, and other law professionals to serve in these same roles.
- Maintained a confidentiality agreement pertaining to specific procedures of the program and the protection of privacy and identity for all defendants.
- Completed community service hours as an active member of the community and shadowed court proceedings yearly in order to gain a better root understanding.

TECHNICAL SKILLS

Bloomberg, GAAP Accounting, Excel, Illustrator, Autodesk Inventor, CDK Global

HONORS AND ACTIVITIES

Dean's List, Fall 2020 – 2022, Clemson Financial Planning Association, 2021 – present
Clemson Finance Club, 2021 – present, Clemson Canine Companions, 2020 – present

KOURTNEY DUNN

kourtn@clemson.edu . dunnkourtney@yahoo.com . (570) 637-6770
Current Address: 100 Old Central Rd, Unit 119, Clemson, SC 29631

EDUCATION:

Clemson University

Bachelor of Science Degree in Financial Management, Minor in Accounting

Emphasis: Corporate Finance

Clemson, SC

May 2024

WORK EXPERIENCE:

NHE, Inc. – Accounting Assistant

Summer of 2023 (Current) – Greenville, SC

- Responsible for producing and preparing all monthly financial statements and assembling the package for each property
- Communicated with the controller about verifying the packages and any major expenses
- Examined cash management for each property: reviewing cash balances, inspecting subsidy hitting the accounts, then process and committing check and EFT payments
- Perform invoice processing, check them bi-weekly, following up on any possible missing invoices for the month and checking the bank to verify adjustments that have left the account
- Ensured property and tenant lease input was accurately entered
- Prepared 9520 packages and produced reserve requests forms

NHE, Inc. – Accounting Intern

Summer of 2022 - Greenville, SC

- Processed unclaimed property escheatment to help close out the account for SC, NC & GA states
- Generated Audited Financial Statements for properties for third-parties
- Assisted with entering payroll into Yardi systems

The Dunn Group – Receptionist/Data Entry Clerk

September 2016-2021- Towanda, PA

- Welcoming customer and helping them with any services needed and direct accordingly
 - Employ excellent phone etiquette and customer service skills incoming calls, identifying the purpose of the call and appropriately routing or taking message for call
 - Designed a Microsoft 365 Business Account with the Marketing Department, shadowing showing for home with the real estate department and shadowing accounting department with end of year reports
 - Organized and managed our annual golf tournaments
-

LEADERSHIP PROGRAMS:

- Clemson Women in Business Club, Finance Club, Wall Street South Investment Club, & Real Estate Club
- Mauldin & Jenkins Envisions Leadership Program in Atlanta, GA

SKILLS:

- Yardi Systems (Proficient)
- Bloomberg Terminal – *Investment Analysis & Stock Market – How The Stock Market Works.com*
- Microsoft 365, Excel, Word (Proficient) – *Management Personal Computer Applications Course*

REFERENCES: Available upon request

Jack Earnhardt

15 Clifdon Dr, Simsbury, CT 06070 | (860)-463-6514 | Jearnhardt21@gmail.com

SUMMARY

A team-oriented and analytical student with a passion for financial management seeking an opportunity to drive results utilizing an exceptional undergraduate education and a unique background in a range of fields

EDUCATION

Clemson University

Bachelor of Science in Financial Management

Clemson, South Carolina

Anticipated May 2024

Minor: Accounting, Emphasis: Banking and Investments

- Dean's List (2021, 2022)
- **Relevant Coursework:** Investment Analysis, Financial Institutions and Markets, Management of Financial Institutions, Financial Management I&II, Cost Accounting, Financial Accounting I&II, Microeconomics and Macroeconomics

WORK EXPERIENCE

Vaylark Financial Services

Hartford, CT

Summer Intern

06/2022 – 08/2022

- Created various scenario analyses for over ten new clients by utilizing personal tax records and financial statements
- Created alternative portfolios for the purpose of tax-loss harvesting while avoiding wash-sale violations
- Helped plan and facilitate the annual client dinner for over 200 guests
- Contributed to all client meetings and lunches with financial product vendors

Simsbury Volunteer Fire Company

Simsbury, CT

Cadet

08/2017 – 06/2021

- Responded to emergency situations that required fire department intervention (on call 24/7)
- Participated in training exercises to maintain current firefighting techniques to assess each emergency response coherently

Mclean Retirement Home

Simsbury, CT

Dining Associate

06/2023 – 06/2023

- Adapted service techniques to accommodate varying cognitive levels of 28 patients, ensuring a comfortable and calm dining and living experience
- Collaborated closely with the nursing and caregiving teams to maintain awareness of patients' evolving conditions

Allen S. Goodman Inc.

East Hartford, CT

Warehouse Employee

11/2020 – 07/2021

- Completed bulk distribution packaging with a high level of accuracy on up to 7000 orders a night
- Optimized inventory management through routine updating of inventory, further ensuring high-demand items were on hand
- Worked on a diverse team which provided practical teamwork skills and a collaborative workplace culture

Rosedale Farms and Vineyards

Simsbury, CT

Farm Hand

06/2016 – 08/2020

- Coordinated with the farm owner to deploy teams for seasonal agriculture projects to maintain a fully stocked farm stand
- Implemented an efficient irrigation system throughout 109 acres, which helped maximize the output during the harvest
- Acquired knowledge of irrigating, cultivating, planting, and operating machinery to carry out day-to-day operations while exercising independent judgment

EXTRACURRICULAR

Clemson University

Entrepreneurship Club

Finance Club

Healing Meals

Wall Street South Investment Club

Alpha Tau Omega Finance Committee

Soapstone Church Volunteer

SKILLS

- Proficient to intermediate skill levels in Excel, Powerpoint, Python (beginner), Tableau, AutoCAD, Adobe Suite, VBA, and Bloomberg Terminal

WILLIAM GARRETT EATON

918-605-0275 | 9809 S Jamestown Ave Tulsa, OK 74137 | weaton@g.clemson.edu |
[linkedin.com/in/garrett-eaton/](https://www.linkedin.com/in/garrett-eaton/)

EDUCATION

Clemson University

Graduation: May 2024

Major: B.S. in Financial Management (Corporate Finance Emphasis)

GPA: 3.40/4.0

Minor: Accounting

- **Honors:** Dean's List
- **Relevant Coursework:** Investment Analysis, Cost Accounting, Financial Accounting Concepts, Intermediate Financial Accounting, Management of Financial Institutions, Business Writing, Entrepreneurial Mindset
- **Order of Omega:** Prestigious honors society for Greek organization leaders, recognizing top 5% of academic achievers among the university's fraternities and sororities
- **Interfraternity Council (IFC) Honor Court:** Elected member of campus-wide disciplinary and governing body
- **IFC New Member Mentor:** 8 week process mentoring and educating new members so that they become strong initiated members of the Fraternity and Sorority Life community at Clemson
- **Alpha Tau Omega (ATO) Fraternity:** Fundraising coach and part of team that met \$150K goal over three-year span
- **ClemsonLIFE:** Mentor intellectually disabled students with socialization and health/wellness
- **Clubs:** Finance Club, Wall Street South Investment, Entrepreneurship Club

WORK AND OTHER LEADERSHIP EXPERIENCE

Financial Analyst/Business Development Intern, World Travel Service, Tulsa, OK

Summer 2023

- Prepared financial models, analyzed, and reported financial data to the entire company every day.
- Researched and contacted potential clients to develop and grow business and its operations.

Financial/Marketing Analyst Intern, World Travel Service, Tulsa, OK

Summer 2022

- Prepared daily company reports on Excel and Microsoft Office to reveal improvements the company has made, comparing numbers from the 2022 fiscal year to 2019 (pre-COVID). Researched and provided analysis on select traveler segments

Financial Analyst Intern, Regent Bank, Tulsa, OK

Summer 2021

- Collaborated with members of each department on both the commercial and retail sides of the bank to learn the internal structure.
- Observed and supported with the intricacies of the internal loan approval process

Youth Mentor, Tulsa Hills Youth Ranch, Tulsa, OK

Fall 2019-Spring 2020

- Volunteered for a one-on-one mentor/mentee program with at-risk youth to teach valuable life skills

SKILLS AND INTERESTS

Certifications/Professional Skills:

- Enrolled In Adventis' Financial Modeling Certification (FMC) Program
- Leadership, Data Analysis and Reporting, Teamwork, Writing, Microsoft Office

Personal Interests

- Geography, Maps, Travel, Cultural Demographics, Cooking, Skiing, Basketball, Volunteering

AVERY EDDINS

Avery.eddins55@gmail.com – (803) 795-7212
www.linkedin.com/in/avery-eddins-022626199

110 N. Clemson Ave, Apt 8
Clemson, SC 29631

EDUCATION

Clemson University, Wilbur O. and Ann Powers College of Business

Clemson, South Carolina

Bachelor of Science in Financial Management

May 2024

Minor: Accounting, Emphasis: Corporate Finance

Cumulative GPA: 3.58/4.00

RELEVANT EXPERIENCE

Bank of America

Charlotte, NC

Global Risk Summer Analyst

May 2023 - August 2023

- Reviewed client business activity via Excel to determine loan fraud using attention to detail and strong business acumen
- Analyzed over 100 clients totaling over \$50,000,000 in loan fraud reported to internal investigations
- Participated in team calls to set weekly objectives and target clients of suspected loan fraud
- Presented my internship experience and work assignments to key stakeholders on my team's floor

Black Oak Equipment Rental LLC

Sumter, SC

Office Assistant

May 2021 - August 2021

- Collaborated with staff to analyze fiscal and financial activity and assisted in making decisions regarding budget adjustments and making predictions for upcoming quarters
- Generated Accounts payable and Accounts receivable values by monitoring supplier and vendor transactions each month

Fastenal Industrial Supplies

Anderson, SC

Supply Chain Management Intern

May 2022 - August 2022

- Communicated with various branches throughout the country to ensure product operations were efficient
- Assisted management in quoting product orders, fulfilling client requests, and brainstorming sales initiatives
- Performed weekly inventory audits, ensuring stock count was correct. Used inventory software to report findings

CUSTOMER SERVICE EXPERIENCE

Server

Boykin, SC

Mill Pond Steakhouse

May 2020 - August 2020

- Provided excellent customer service to patrons through timely service and a strong ability to multitask
- Managed individual financial transactions of up to \$300+ with key attention to detail

HONORS & AWARDS

Dean's List - Spring 2021, Spring 2022, Spring 2023

Awarded to students earning a 3.5 GPA or higher

Presidents List - Fall 2023

Awarded to students earning a 4.0 GPA

South Carolina Life Scholarship - Recipient

Awarded to South Carolina students graduating in the top 30% of their class

CAMPUS & COMMUNITY INVOLVEMENT

Navajo Nation Tribal Roll, Member

Fall 2020 - Present

Eta Alpha Chapter, Theta Chi Fraternity, Member

Fall 2021 - Present

Real Estate Club, Member

Fall 2022 - Present

Beta Alpha Psi Honors Fraternity, Member

Spring 2023 - Present

Luis Elizondo-Villasis

(864) 569-2728 | lelizo4182@gmail.com | www.linkedin.com/in/luis-elizondo-villasis

Education

Clemson University, Honors College Clemson, SC
Bachelor of Science in Financial Management, Corporate Finance Emphasis May 2024
Bachelor of Science in Marketing, Minor in Accounting GPA: 3.76/4.0

Work Experience

GE Vernova May 2023-August 2023
Gas Power Financial Management Program (FMP) Intern Atlanta, GA

- Prepared a summary of and performed cost analysis of as sold versus as executed to understand drivers of cost variances on key Aero Services jobs, analyzing over \$70M from 35 different jobs, identifying over \$1M in billing recovery opportunities.
- Successfully reduced initial report building and data gathering time by 75% by incorporating various formulas and merging different data sources into one workbook.
- Created a detailed SOP that walks through the report building and necessary steps to successfully conduct the variance analysis.
- Collaborated with a group of interns to create an SOP for a solution in the PowerMax ERP system to ensure projects are properly recorded and present to stakeholders.
- Support the Aero Services team with activities such as escalation files and timely billing.

Tecnoip.com June 2020 to Present
Online Support Specialist Intern S.L.P., Mexico

- Created the company's first semi-automated monthly financial reports from the sales system data using Pivot Tables and Power Query.
- Collaborated with a team to successfully run a marketing Facebook campaign to celebrate the company's 15 years, which generated over 11,000+ impressions and 7,000 interactions on the new Facebook page.
- Effectively use Adobe Premier Pro to create content for the company's new YouTube page generating 160,000+ views.

UPIC - Clemson University August 2022 to May 2023
Faculty Senate Social Media Intern Clemson, SC

- Manage and create content for various social media platforms for Clemson's Faculty Senate, resulting in 500%+ and 122% increase in visits on Facebook and Instagram.
- Present a social media plan for the year to the Provost, Vice President of Finance, and other high-ranking people at Clemson University.

SSI PHYSICAL THERAPY June 2020 to August 2022
Group Fitness Instructor Greer, SC

- Responsible for leading, managing, and writing strength and conditioning workouts 3 days a week for 20+ athletes.

Other Experience

Clemson Club Soccer Spring 2022 to May 2023
President and Captain Clemson, SC

- Lead team of over 55 players to club's first ever National Championships series appearance.
- Received student funding and collected player dues while managing \$20,000 of finances.
- Plan and schedule the hosting of one of the biggest tournaments in the Southeast, made up of 12 different teams with 20+ players on each team.
- Hold tryouts leading 180+ players over 4 days to successfully identify and select 12 new players to take on the team.

Honors and Awards

President's Scholar List (4.0 GPA) *Clemson University* Fall and Spring 2022
President's Scholar List (4.0 GPA) *Clemson University* Fall and Spring 2021

Relevant Skills

Completely bilingual - English and Spanish – native proficiency
Proficient with Microsoft Office (Excel, Word, PowerPoint)
Advanced Excel Workstation Skills Certification (2023), Presentation Workstation Skills Certification (2023)
Bloomberg Terminal Experience
Familiar with Tableau Software
Hootsuite Social Media Marketing Certification (2022), Hootsuite Platform Certification (2022)

GRACIE ELLINGTON
406 Oakmont Valley Trl, Senca, SC 29678
(828) 508-7308
gelling@g.clemson.edu

EDUCATION

CLEMSON UNIVERSITY
Bachelor of Science in Financial Management
Minor: Accounting, Emphasis in Corporate Finance

Clemson, SC
December 2023

EXPERIENCE

PALMETTO ENGINEERING AND CONSULTING
IT Intern

Piedmont, SC
Summer 2020, Summer 2022

- Aided head of internal IT in resolving IT-related and application issues company wide.
- Represented PEC by developing online booth for the National Telecommunications Cooperative Association: Rural Broadband Association Virtual conference.
- Researched and implemented devices to increase efficiency for employees while using ArcGIS online mapping software.
- Installed company computers with proper software needed for engineering field for the 60+ new employees in various positions.

PALMETTO ENGINEERING AND CONSULTING
Administrative Assistant and Human Resource Intern

Piedmont, SC
Summer 2019

- Worked directly with head of HR, Deborah Loftis, to introduce and enroll new hires into positions.
- Improved internal communication by installing digital signage across 6 locations in various states.
- Assisted CEO, George Wyatt, in various administrative tasks such as hotel arrangements, etc.
- Traveled to Rainsville, AL to attend a grounding seminar led by VP of PEC, Chris Roland, followed by field work to learn firsthand application of grounding techniques for telecommunication systems.
- Managed office supplies and marketing materials used internally as well as material for trade shows.

VOLUNTEER WORK

FELLOWSHIP OF CHRISTIAN ATHLETES
Lighting Director of Production Team

Clemson, SC
August 2021 – Current

- Artistically designed lighting and staging for FCA weekly gathering of 700+ students.
- Coordinate with team of 15+ members of varying experience levels to develop plan to perform all tasks needed to support a full band.
- Facilitate conversation and implement critical thinking skills to solve technical issues within a limited timeframe each week.

SKILLS

Bloomberg Market Concepts Certification
Computer technology skills including proficiency in Microsoft Office Applications.
Leadership (Problem solving, conflict resolution, delegation)
Communication skills with focus in Customer Service.

CLUBS

Wall Street South Investment Club
Clemson Women in Business
Clemson Finance Club

Hale Emerson

706 Fairway Drive, Florence, SC 29501 | hhemers@g.clemson.edu | 843-610-9849

Education

Clemson University, College of Business

May 2024

Bachelor of Science in Financial Management

Emphasis: Real Estate

Cumulative GPA: 3.52/4.0

Lorenzo de Medici Florence, Italy

Summer 2022

- Engaged in a one month study abroad experience in Florence Italy
- Explored Italian culture, art, and history while enhancing academic and personal growth through fascinating courses and riveting activities

Work Experience

Elliott Davis, LLC

June 2023 - July 2023

Transaction Advisory Services Intern

- Collaborated with skilled team contributing to due diligence projects, financial analysis, and enhancing understanding of transaction processes and their impact on business decisions
- Assisted with client work and worked with clients to help meet their needs
- Worked with Power Query, learned how to create flat files to use when completing financial statements for clients

Florence Country Club

May 2022 - January 2023

Assistant Manager

- Operational Oversight: Efficiently managed daily pool operations, ensuring smooth functioning of facilities, adherence to safety protocols, and exceptional member experiences
- Team Leadership: Supervised and motivated pool staff, including lifeguards and attendants fostering a productive and enjoyable team environment.
- Member Relations: Cultivated positive relationships with club members, addressed problems, resolved concerns, and organized engaging poolside events to enhance member satisfaction.

Florence Country Club

May 2016 - August 2020

Tennis Instructor

- Instructed personalized tennis lessons, enhancing students' skills, technique, and enjoyment of the game through tailored coaching and effective feedback.

Leadership and Service

Kappa Alpha Order Fraternity, Clemson University

August 2020 - Present

- Current Member

House of Hope, Florence, SC

January 2020

- Helped serve food to those living at the House of Hope, a shelter for the homeless.

Special Olympics, Florence, SC

May 2019

- Assisted in organizing and facilitating activities for the Special Olympics participants, fostering camaraderie and a supportive environment during the events.

Activities, Awards, and Interests

Activities: Finance Club, Wall Street South Investment Club

Interests: Traveling, Running, Being Outdoors

Harrison Emery

250 Elm Street, Clemson, South Carolina 29631

(803) 552-2391 hemery2742@gmail.com

Education

Clemson University | Clemson, S.C.

May 2024

Bachelor of Science in Financial Management

Minor in Accounting, Emphasis in Real Estate

Relevant Coursework: Management PC Applications, *Cost Accounting, Intermediate Financial Accounting*

Professional Profile

- Skilled at capturing and recording data, using shortcuts and formula functions, creating charts and graphs, sorting and filtering data, and using pivot tables in Microsoft Excel
- Extensive knowledge on how to create interactive slideshows, inserting, embedding and linking media and data, and inserting hyperlinks in Microsoft PowerPoint
- Excelled in customer service roles, adeptly addressing inquiries and resolving issues, while maintaining a high level of professionalism

Organizations

- Finance Club Member
- Real Estate Club Member
- Wall Street South Investment Club Member
- Student Affiliate of the Appraisal Institute

Experience

Bayhost/Topgolf

Augusta, GA Summer 2023

- Developed strong interpersonal skills through customer interactions
- Thrived in a fast-paced environment, managing tasks, appointments, and deadlines efficiently
- Adapted to unforeseen challenges while serving customers, capable of swift issue resolution
- Ensured accuracy in order taking and billing, demonstrating precision in tasks
- Thrived in a cooperative setting, skilled in effective collaboration with colleagues and clients

Cashier/Food Lion

North Augusta, S.C. 2019 - 2020

- Provided friendly customer service to all customers
- Organized and monitored currency from transactions made by customers
- Confirmed all transactions were accurate while working in a fast-paced environment
- Streamlined customer transactions through memorizing product codes

Ben Escanilla

18708 Ashbourne Place • Olney, MD 20832 • (240) 401-4596 • benescanilla27@gmail.com

EDUCATION

Clemson University, Wilbur O. and Ann Powers College of Business

Clemson, SC

Bachelor of Science in Financial Management

May 2024

Minor: Accounting, Emphasis in Banking and Investments

Current GPA 3.22/4.0

EXPERIENCE HIGHLIGHTS

Business Analytics Intern

Cambridge, MA

Flagship Pioneering

Summer 2023

Venture capital firm that invests in biotechnology, life sciences, and health and sustainability.

- Collaborated with a team to create data-driven presentations for portfolio companies
- Conducted research for Atopic Dermatitis for a potential investment opportunity
- Compiled an analysis of competitor agriculture tech companies and developed a methodology to help create a precise valuation of Flagship's private agriculture tech companies
- Honed data analysis skills, demonstrated effective collaboration, and provided valuable insights which made a positive impact on the firm's strategic initiatives.

Industry Special Services Group Intern

McLean, VA

BDO USA

Summer 2022

Professional services firm providing public accounting, tax, consulting, and business advisory services.

- Assisted with identifying and defining requirements for an updated systems proposal for a client
 - Developed presentations and visual support documents to supplement business analyses
 - Utilized tools such as Visio and Excel to illustrate business processes and requirement details
 - Developed business relationships with colleagues, managers, and mentors to understand BDO's business model and services.
-

QUALIFICATIONS SUMMARY

Self-motivated and highly reliable student positioned to contribute strongly to an organization and team that expects a robust work ethic, effective interpersonal skills, and a commitment to quality work.

- **Organization / Computer Skills:** Strong time-management and organizational abilities. Technical proficiencies include Microsoft Office Suite and Visio.
 - **Problem-solving:** Utilizes strong math and reasoning skills, analyzes information, and evaluates options to solve problems.
 - **Teamwork / Collaboration:** Experienced working with teams for class projects and in sports. Builds lasting relationships with peers, teammates, teachers and coaches.
 - **Key Strengths:** Intelligent and loyal team member, readily listening to others, and contributing to positive and productive work environments and team morale.
-

MEMBERSHIP/AFFILIATIONS

Beta Alpha Psi, Business Honors Society

Clemson, SC

Vice President of Programming

Summer 2023 - Present

- Create value for members by recruiting top firms to speak about professional and personal development and cultivate our mentorship program
- Focus on scholastic and professional excellence in accounting, finance, and information systems.

Samuel Etheredge

113 Crest Hill Rd. Jamestown, NC 27282 | 336-681-0023 | sethere@clemson.edu |

Education

Clemson University, Clemson, SC

May 2024

- Bachelor of Science in Financial Management
- Minor in Accounting, Emphasis in Corporate Finance
- Dean's List: Fall '22, Spring '23

Skills

MATLAB, Microsoft Office, Moneyguide Pro, Morningstar, Tableau, Communication, Strong attention to detail

Certifications

Securities Industry Essentials Exam (July 2021)

Experience

Ameriprise Financial Services: Panoptic Capital Management

Winston-Salem, NC

Financial Advisor Intern

September 2020 - August 2023

- Created model portfolios and implemented them firm-wide, which led to an increase in firm efficiency
- Analyzed client cash-flow needs and helped the advisor make suggestions to clients to address their needs
- Conducted research on individual stocks, ETF's and mutual funds to fit client portfolio needs
- Effectively communicated investment products such as fixed rate products, and managed accounts
- Created presentations detailing retirement plans for client presentation
- Adjusted model portfolios as needed to account for changes in macro-economic conditions
- Created models to track economic activity which were used to help guide investment decisions

Southern Roots Inc.

Jamestown, NC

Food runner/Busboy

February 2017 - August 2019

- Ensured quality and presentation of food before delivering to customers in a high intensity environment
- Trained new busboys by using effective communication and leading by example

Aquatech Pool Management Group

Jamestown, NC

Assistant Pool Manager

May 2017 – August 2020

- Assisted with managing 12 lifeguards, managing guards on shift and being a team player
- Maintained safety of pool patrons by enforced rules
- Ensured cleanliness of facilities and tested pool water hourly

Extracurricular Activities, Leadership, Hobbies

CUSG Floor Senator- Student Activities Committee (2021-2022) Eagle Scout

Hampden Sydney Shelton Leadership Challenge Pi Kappa Alpha Clemson- Judicial Board

Action Shooting Club Norwest Outward Bound School- North Cascades Alpine Backpacking & Kayaking

Hunting Fishing Backpacking Weightlifting Gardening

Nathaniel Feeley

(860) 670-4376 | nfeeley@clemson.edu | <https://www.linkedin.com/in/nathanielfeeley1714/>

EDUCATION

Clemson University

Bachelor of Science in Financial Management

Minors: Architecture, Management Information Systems

Emphasis: Real Estate

Clemson, SC

May 2024

GPA: 3.4/4.0

Clemson University

Architecture Study Abroad Program (12 credits)

Genoa, Italy

Summer 2022

WORK EXPERIENCE

Website Closers, Financial Analyst

Summer 2023

- Modeled, analyzed, and interpreted financial statements of companies being marketed for sale
- Participated and assisted in deal negotiations
- Researched prospective companies for potential purchase or sale
- Managed social media platforms, including LinkedIn, Youtube, Instagram, and Tiktok

Remote

Wasserman Next Gen, Brand Ambassador

Spring 2023

- Promoted and marketed new Anheuser-Busch product by building brand awareness, driving product trial, and creating brand loyalty
- Completed weekly reporting forms on peer-to-peer engagement, lifestyle integration, and social media content
- Collaborated daily with account manager to define networking goals
- Distributed 160+ cans a month to verify performance of new product in target market

Clemson, SC

Port City Club, Harp & Crown, Server/Busser (Seasonal)

Spring 2021-Present

- Service approximately ten parties per shift efficiently and timely in a professional manner
- Manage cash and credit card transactions and manually tip out other employees at the end of each shift
- Trained five new employees in operations of the restaurant & menu knowledge
- Work with a team of managers, hosts, food runners, and expos to provide excellent customer service

Cornelius, NC

RELEVANT EXPERIENCE

Bloomberg Global Trading Challenge, Participant

Fall 2022

- Utilized a \$1 million budget to invest in portfolio of equities, bonds, and other securities
- Used discounted free cash flow and dividend modeling, P/E multiples, and other financial ratios to estimate equity valuations for potential investment
- Performed corporate bond, mutual fund, and yield curve analyses with Bloomberg Terminal

Clemson, SC

Psi Upsilon Fraternity, Recruitment & Brotherhood Chairman

Fall 2021-Present

- Plan recruitment program and maintain a list of potential new members for the chapter
- Communicate with and advertise the fraternity to potential new members
- Monitor overall health of fraternity chapter by addressing concerns of brothers that they may not feel comfortable sharing publicly or officially
- Refer brothers to necessary resources if required

Clemson, SC

COMPUTER SKILLS

Bloomberg Market Concepts Certified

Microsoft Excel

Tableau Desktop

Autocad/Adobe Applications

HONORS AND ACTIVITIES

Appraisal Institute (Student Affiliate)

Summer 2023-Present

Finance Club (Member), Real Estate Club (Member), Order of Omega (Member)

Spring 2023-Present

JACKSON FENSKE

Jrfensk@g.clemson.edu | (612) 554-7286 | 4504 Drexel Ave Edina, MN 55424

EDUCATION

Clemson University - Willbur O. and Ann Powers College of Business Clemson, SC
Bachelor of Science in Financial Management *May 2024*

- **Emphasis:** Banking & Investments, **Minor:** Accounting
- **Cumulative GPA:** 3.15/4.00; Dean's List in 2021
- **Key Projects:** Trade Analysis' (Bonds, ETFs, Mutual Funds), Personal Portfolio, Full Financial Statements

EXPERIENCE

Wealth Investment Management Intern, Wells Fargo - Minneapolis, MN *Jun 2023 - Aug 2023*

- Met with leaders at all levels of the institution including senior leaders, team members, and vendors
- Learned new systems, applications, processes and techniques such as E-Money and Smart Station
- Lead and participated in projects or support activities which span across the organization
- Gained an understanding of business needs and provided possible solutions by explaining in clear verbal and/or written communications to management and coworkers.

Co-Founder, Bandit Golf Co. - Edina, MN *Apr 2019 - Aug 2022*

- Contacted local golf courses to allow the removal of balls for resale
- Created a website & delivery form to increase our reach to hundreds of customers
- Expanded our influence by putting ads on online marketplaces and in local pro shops
- Maximized profits by taking the best offers from refurbishing companies
- Enhanced my knowledge of small businesses by growing the business and learning key lessons

Caddy, Interlachen Country Club - Edina, MN *Apr 2018 - Jun 2023*

- Carried golfer's bags, read greens, and cleaned clubs to ensure the golfer's best experience
- Ensured the course was in better shape after every round by filling divots and fixing ball marks
- Utilized communication & teamwork skills while interacting with coworkers to ensure a successful outing
- Ensured the members' and guests' expectations were met every time by discussing their wants and needs

CERTIFICATIONS, SKILLS, & ACTIVITIES

- **Certifications:** SIE - FINRA (*Aug 2023*), Bloomberg Certification - Clemson University (*Dec 2022*)
- **Skills:** Leadership, Analytical & Quantitative Skills, Adaptability, Bilingual: Spanish & ASL, Microsoft Excel & PowerPoint, Detail-Oriented, Strong written and verbal communication
- **Activities:** Chi Phi Fraternity, Clemson Finance Club, Clemson Business Analytics Club, Clemson Investment Banking Club, Clemson LIFE & Best Buddies, IM Sports

AMANDA FITZWILLIAM

amandafitzwm@yahoo.com | (314) 281-3057 | Lake Wylie, SC 29745 | linkedin.com/in/amandafitzwilliam

EDUCATION:

Clemson University | Clemson, South Carolina May 2024
Bachelor of Science in Financial Management
Dual Minors: Political Science and Accounting *Emphasis: Financial Planning* *GPA: 3.86/4.0*

WORK EXPERIENCE:

Taylor Law, PLLC | Intern Belmont, NC
June 2023 – August 2023

- Drafted legal documents for both estate and real estate clients
- Participated in real estate closings with the attorney
- Worked directly with the firm's attorneys and paralegals
- Assisted the firm in Excel and OneDrive use

Clemson University Softball Team | Head Student Manager Clemson, SC
Jan 2021 – Dec 2022

- Coordinated activities of subordinate student managers
- Worked directly with Clemson Athletic Department head equipment manager
- Acted as a liaison between the Clemson Marketing Department and softball team
- Assisted coaches and senior staff with daily softball related activities

Allison Consulting LLC | Intern Charlotte, NC
June 2022 – August 2022

- Assisted staff members with tasks
- Conducted research for issues and organizations

X-Golf Charlotte | Associate Tega Cay, SC
June 2022 – August 2022

- Assisted customers with any technical difficulties that arose
- Provided customer service by serving both food and beverages

Joe Cunningham Campaign for Governor | Intern South Carolina
July 2022 – Nov 2022

- Set up and ran the 'Clemson for Cunningham' Instagram
- Grew the social media page from 0 to 200 followers in 3 months
- Learned to use VoteBuilder to assist the campaign
- Phone banked both potential voters and volunteers

VOLUNTEER EXPERIENCE:

Education First | Full Immersion International Volunteer Ollantaytambo, Peru
June 2019

- Helped build a sunshade for a local elementary school
- Taught local 5/6-year-olds English words and phrases through games, art, and sports
- Experienced Peru's unique culture through traditional cooking classes and artisan workshops

RELEVANT COLLEGE COURSE WORK:

Business: Individual Taxation, Cost Accounting, Investment Analysis, Risk Management and Insurance, Portfolio Management and Theory, Retirement and Estate Planning

Political Science: American Political Thought, US Foreign Policy, Political Terrorism, Populism

Thomas Fullerton

New Rochelle, New York
tmfulle@g.clemson.edu
(914) 525-8150

Education

Clemson University, College of Business

Clemson, SC

Bachelor of Science in Financial Management

May 2024

Minor: Accounting, Emphasis: Corporate Finance

Cumulative GPA: 3.58/4.0 | Dean's List: Fall 2020 – Spring 2022

Experience

Fortress Investment Group

New York, NY

Commercial Real Estate (CRE) Credit Intern

June 2023 – July 2023

- Reviewed loan documents originated by the CRE group and conducted independent valuations
- Assessed financial models, investment memos, and market comparables for previous and current deals
- Gained exposure across real estate classes, including retail, multi-family, office, and student-housing
- Developed executive presentation skills through delivery of project to commercial real estate team

WelPak Corp. & TK Fine Arts Services

New York, NY

Shipping, Receiving, & Installation Intern

Summer 2021 – January 2023

- Communicated with high profile clients in assisting with packing, transporting, and installing antiques and artwork in homes
- Packed and shipped large quantities of artwork to be delivered to galleries in the tri-state area
- Signed off on numerous contracts at delivery and pickup locations for high-valued pieces of artwork
- Collaborated with team of four to deliver and install artwork efficiently while minimizing risk

Beach Point Club

Mamaroneck, NY

Camp Swim Instructor and Head Guard

Summer 2017 - Summer 2020

Leadership

Wall Street South Investment Club

Clemson, SC

General Member

Fall 2022 - Present

- Manage a virtual portfolio of \$100,000 focused on asset selection including stocks, bonds, mutual funds, and options
- Conduct periodic review of portfolio composition, asset rebalancing, and performance and risk

Clemson Real Estate Club

Clemson, SC

General Member

Fall 2023 - Present

- Network with professionals in real estate from various parts of the industry through forums and events

Phi Gamma Delta Fraternity

Clemson, SC

Social Committee

December 2020 – Present

- Organize fraternity events within the chapter and council while managing costs and a \$20,000+ budget

Skills

- Proficient with Microsoft Office and G Suite

CONNOR J. FULTON

919-407-1802 | cfulton245@gmail.com | 93 Creekside Road | Hopewell Junction, New York 12533

EDUCATION

Clemson University Clemson, South Carolina
Bachelor of Science in Financial Management, Corporate Finance Emphasis May 2024
Minor: Accounting

EXPERIENCE

Allstate Chicago, Illinois
Investor Relations Intern May 2023- August 2023

- Worked on the script and earning deck for the Q2 earnings call
- Performed market share analysis for competitors, Allstate, and the industry as a whole for all 50 states.
- Competed in an entrepreneurship challenge with a team of 4, where we were given a problem and 72 hours to create, plan, and present a solution to over 400 employees.
- Sent weekly competitor financial analysis and analyst summaries to Allstate's CEO and executive board

MBE Global Barcelona, Spain
International Intern January 2023- April 2023

- Present the MBE business opportunity to potential Master Licensees and support negotiations
- Conduct market research on various countries/regions.
- Analyze and improve documents in 4 different languages.
- Work and communicate in an office of non-English speaking individuals.

Seiden Advertisement Manhattan, New York
Intern Summer 2022

- Researched and presented detailed information on clients' competitors, contributing to the business strategy put into place for the client.
- Analyzed project financial budgets and company payroll.
- Tracked and analyzed social media content for clients all around the country.
- Created and adjusted project timelines for clients.

LEADERSHIP EXPERIENCE

Clemson University Guide Association Clemson, South Carolina
Recruitment Director/ Member October 2021-Present

- Selected to lead groups of 1-25+ people on tours of campus while answering questions and engaging them with a diverse group of campus visitors. Represent Clemson University to prospective students and families.
- Recruiting and interviewing over 500+ potential candidates to find the best students to represent the school.

Alpha Tau Omega Clemson, South Carolina
Philanthropy Chair January 2021-Present

- Plan, set up, and ran a week-long fundraising event, "Viking Week" that incorporates 4,000 people and raises \$60,000+ a year for the Upstate Warrior Solution - a community-based nonprofit organization that connects Warriors (active/veterans) and their families to resources and opportunities.
- Coordinate many other philanthropy events, including starting an annual fundraising golf tournament, a 3,000-person concert

CLUBS AND COMMUNITY SERVICE

Wall Street South Investment Club

- Discuss, learn, and practice investment decisions and techniques. Participate in an investment competition with 300+ individuals.

Entrepreneurship Club

- Listen, discuss, and learn from professionals and other students about how to create, run, and grow a success business.

Neal Fyock

2378 Bel Crest Circle - Midlothian, VA 23113 - nfyock@g.clemson.edu - 410-804-3991

EDUCATION

Clemson University, College of Business

Bachelor of Science in Financial Management

Emphasis: Banking and Investments, Minor: Accounting

Clemson University Scholarship Award

Clemson, SC

May 2024

Cumulative GPA: 3.9 / 4.0

WORK EXPERIENCE

The Foundry Golf Club

Server/Bartender/Caddie

May 2023 - August 2023

Powhatan, VA

- Provided exceptional customer service, taking and delivering orders accurately and promptly.
- Maintained a clean and organized dining area as well as conducted point of sale transactions to ensure accuracy in accounting.
- Assisted golfers with course strategy, provided support, and built relationships with players, enhancing their overall experience.
- Improved skills in communication, problem-solving, teamwork, and attention to detail.

NAPA Kitchen and Wine

Bartender

May 2022 – August 2022

Richmond, VA

- Greeted customers and provided a positive and memorable experience by advising items and specials.
- Prepared a wide selection of cocktails, wine, and other beverages in a timely manner for restaurant guests.
- Performed daily inventory audits and kept the bar safe, clean, organized, and well-stocked.
- Demonstrated problem-solving skills as well as leadership skills through training new staff.

World Class Courts

Resurfacers

May 2021 – August 2021

Richmond, VA

- Coordinated and led work-team when resurfacing tennis and basketball courts throughout the southeast.

SAC (Soccer Association of Columbia) Training Academy

Soccer Coach (seasonal)

April 2016 – August 2020

Columbia, MD

- Coached weekly soccer camps with up to 300 kids between ages of five and 14. Learned how to adjust different teaching techniques and methods for varying age groups.

ACTIVITIES AND HONORS

Wall Street South Investment Club at Clemson University

August 2023 - Current

- Experience trading securities and managing an investment portfolio using an extensive trading simulation that includes stocks, bonds, mutual funds, options, futures, and international stocks.

Sigma Alpha Epsilon Fraternity

Scholarship Chairman

January 2022 – Current

Clemson, SC

- Ensure that fraternity GPA average maintains a good standing and aim at improving members grades by tracking performance and providing guidance to those in need of support.
- Plan and conduct study hours to give members a comfortable space to learn and improve academically.
- Inform chapter members about campus resources and other opportunities that arise.

Glenelg Country School

2020 Moxley-Scholar Athlete Award

May 2020

Ellicott City, MD

- Best combined academic achievement and athletic accomplishment award.

STRENGTHS

- Interpersonal Communication
- Analytical Thinking
- Leadership and Management
- Problem-solving
- Proficient in Microsoft Office Suite and Bloomberg Terminal Software

Analia Gallagher

Clemson, South Carolina & NYC • (347) 885-9056 • analiag@g.clemson.edu

Education

Clemson University, Wilbur O. and Ann Powers College of Business
Bachelor of Science in Financial Management
Minor: Accounting, Emphasis: Financial Planning

Clemson, SC
May 2024

Work History

Style Advisor/Sales Associate

June 2021- August 2023

Aritzia

Woodbury, NY

- Drove sales with more than \$30,000 in weekly revenue through suggestive selling and promoting add-on purchases.
- Operated cash registers, managed financial transactions, and balanced drawers.
- Demonstrated excellent communication and interpersonal skills to build customer relationships.
- Collaborated with team members to ensure exceptional in-store experience for customers & maintain store appearance.
- Assisted in inventory management and restocking to maintain store appearance and meet customer demands

Sales Associate

July 2019- May 2020

American Eagle Outfitters

Woodbury, NY

- Greeted customers and determined their needs, offered assistance, and provided solutions to drive sales.
- Maintained knowledge of current sales, promotions, and policies regarding payment and security practices.
- Presented customers with merchandise recommendations based on their needs and preferences.

File Organizer

December 2016- January 2018

Medicine Chest Pharmacy

Woodbury, NY

- Preserved accurate and up-to-date records in the system
- Maintained a clean and organized work area
- Increased office efficiency by effectively filing paperwork.

Professional Summary

Aspiring finance professional with a strong drive to succeed and a passion for the industry. Proficient in data analysis and problem solving, demonstrated through successful coursework and real-world experiences in a fast-paced retail environment. Highly motivated, detail-oriented, and eager to apply skills to a dynamic finance role.

Skills

- Budgeting and finance
- Customer Service
- Powerful negotiator
- Skilled in Excel
- Client-Oriented Expert
- Conflict resolution
- Problem Solving
- Strong verbal communication

Clubs & Activities

- Alpha Chi Omega Sorority
- Women in Business Club
- Wall Street South Investment Club

Wes Garbee

Charles "Wes" Garbee
46 Forest Rd Asheville, NC 28803

(828) 768-1669
wesleygarbee18@gmail.com

Education

Clemson University
Wilbur O. and Ann Powers College of Business
Bachelor of Science: Financial Management May 2024
Minor: Accounting
Emphasis: Banking and Investment

Experience

Park National Bank May 2023- August 2023
Summer Intern

- Served as a teller and assisted our customer service representatives
- My duties consisted of opening and closing the bank and handling cash.
- Shadowed commercial lenders, loan assistants, and credit analysts
- Attended the loan committee and quarterly report conference calls.

Vice President of Psi Upsilon December 2022-Present
External Affairs

- Point of contact to all external affairs of the fraternity, this includes Psi Upsilon nationals, Clemson Psi Upsilon Alumni, and Clemson IFC
- Oversee our PR chair, Service Chair, Philanthropy Chair, Rush Chair, and all committees
- Plan Mom, Dad, and Alumni weekends.

Teaching Assistant January 2022-April 2022
Riflery 1 and 2

- Supervised a rifle range
- Guided students in proper technique of firing a rifle

Budweiser of Asheville May 2022-August 2022
Merchandise Maintenance

- Provided maintenance to our merchandise in restaurants
- Ensured every product was working and up to our standards

Clubs

Wall Street South Investment Club August 2022-Present
Finance Club August 2022-Present
Bloomberg Global Trading Challenge August 2022-Present
Psi Upsilon Fraternity September 2021-Present

- *Vice President, Philanthropy, Ritual and Academic chair*

Skills

-Bloomberg Terminal -Microsoft Excel -Microsoft PowerPoint -Event Planning -Cash Handling -Teller
-Leadership -Critical Thinking -Project Management -Conflict Resolution -Public Speaking

Ethan Gates

15 Winthrop Road, Hingham, MA 02043
(781) 588-7778 - ethangates2001@gmail.com

PROFILE

Highly motivated, hardworking, and team-oriented Financial Management student seeking a career in the finance industry upon my graduation from Clemson University in May 2024.

EDUCATION

Clemson University

Clemson, SC

Bachelor of Science in Financial Management, Minor in Accounting
Emphasis in Banking and Investments

Expected May 2024

Dean's List

INTERNSHIP

Edelstein & Company

Boston, MA

Accounting Intern

Summer 2023

- Performed specific accounting tasks in the areas of cash, receivables, inventory, fixed assets, and expense analysis as delegated.
- Prepared and analyzed financial reports including balance sheets, income statements, and other documents.
- Assisted with researching, data entry, recording and maintaining accurate and complete financial records.

Bernzott Capital Advisors, Inc.

Boston, MA

Operations Intern

Summer 2022

- Completed a variety of database projects at a SEC registered investment manager specializing in both institutional and high net worth investors.
- Retrieved extensive client data from the Firm's trading system to develop an Excel based client database utilizing navigational shortcuts and sorting functionality to be utilized by senior management, operations, client service and the investment team.

EMPLOYMENT

Pelham House Resort

Dennis, MA

Barback

June 2022 -August 2022

- Assisted bartender by handling tasks such as taking and delivering orders, and stocking inventory.

Stone Horse Grill

Harwich Port, MA

Manager

June 2017 – August 2021

- Responsible for day-to-day operations and management of a high-volume luncheonette (\$29K sales).
- Proficient in Excel and created spreadsheets to analyze pricing trends and calculate profit.

CERTIFICATIONS

Securities Industries Essentials (SIE)

Issued August 2023

Excel Class -Intermediate, American Graphic Institute

July 2022

EXTRACURRICULARS

Phi Delta Theta

Clemson University

Executive Officer – Risk Management Chair

November 2020- Present

- Organized fundraiser for 500+ attendees, raising \$13,000 for Amyotrophic Lateral Sclerosis (ALS)

Wall Street South Investment Club

Clemson University

Charles L. Geho

(804) 241-7789 | cgeho@clermson.edu | 201 Westoe Road, Richmond, VA 23229

EDUCATION

Clemson University | Clemson, SC

Bachelor of Science in Financial Management

- Minor in Accounting, Banking and Investment Emphasis

May 2024

GPA: 3.43/4.0

PROFESSIONAL EXPERIENCE

University of Richmond | Richmond, VA

Athletic Fund Intern

June 2023 – August 2023

- Created contract agreements for annual donors of the athletic fund
- Compiled database of all large athletic gifts from past 10 years
- Organized logistics for venue rentals to key athletic games across all sports
- Engaged with former athletes to promote university giving days
- Presented weekly goals and important dates to each employee in office

Davenport & Company LLC | Richmond, VA

Financial Services Intern

June 2022 – August 2022

- Retrieved and recorded client portfolio and risk tolerance preferences
- Oversaw financial transactions to comply with current external regulations and internal controls
- Ensured department database and files were updated in preparation for annual SEC audit
- Converted 4,000 customers' accounts to new Pershing database
- Completed client account project that was presented to Compliance department

Princess Anne Country Club | Virginia Beach, VA

Outdoor Golf Operations

Summer 2021

- Provided prompt and professional customer service to members and guests
- Coordinated golf tournaments and other golf related events throughout the summer season
- Oversaw pace and flow of play on the golf course

Collegiate Summer Quest | Richmond, VA

Summer Camp Counselor

Summer 2020

- Managed a class of students and supervised classroom and recreational activities
- Organized daily lunch and pool times for small groups
- Maintained a professional demeanor when interacting with children and parents

COMMUNITY ENGAGEMENT

Clemson Sports Management Club | Clemson, SC

Member

August 2022 – Present

- Attend weekly guest speaker meetings with people in the sports management profession
- Network with local sports management professionals

Clemson Fellowship of Christian Athletes | Clemson, SC

Member

August 2022 – Present

- Collaborate with fellow students in weekly small and large group environments
- Teach and engage with small groups of students

Matthew Geruso

1025 Maxwell Lane Apt 1114, Hoboken New Jersey, 07030

Mobile: 201-923-8799 | mattlgeruso@gmail.com | <https://www.linkedin.com/in/mattlgeruso/>

EDUCATION

Clemson University, College of Business

Bachelor of Science in Financial Management

Minor: Accounting

Emphasis Area: Commercial Banking and Investments | Corporate Finance

- GPA: 3.5/4.0
- Relevant Coursework: CFA level 1 track, portfolio theory, investment analysis, financial accounting
- Relevant Involvement: Wall Street South Investment Club

Clemson, South Carolina

Expected Graduation: May 2024

RELEVANT WORK EXPERIENCE

Truist Securities, Corporate & Investment Bank

Summer Analyst, Portfolio Management

Atlanta, Georgia

May 2023 – August 2023

- Contributed to the underwriting of 7 transactions, which included detailed 7-year financial projection models, historical financial analysis, exposure profitability models, DCF analysis, and enterprise valuation analysis
- Oversaw 62 client relationships representing \$17.2BN of aggregate exposure in the energy coverage vertical
- Led the annual review process for two oil and gas clients, totaling \$640.0MM in syndicated commitments
- Collaborated on the internal screen process, where bankers weigh the logistics, risks, and profitability of deals
- Observed communication with clients' executive management teams and facilitated approval requests
- Performed quarterly examination of the portfolio by analyzing clients' financial performance to projections, reassessing the risk profile, calculating performance metrics, and completing qualitative due diligence
- Cross-coordinated with various internal teams including leveraged finance, asset finance, financial sponsors, risk, and legal to generate ancillary revenue for the bank and to provide a holistic service to each client

Trustco Bank

Associate Banker

Lake George, New York

May 2021 – August 2021

- Executed 100+ daily transactions for clients' personal and business accounts such as facilitating the point of trade for treasury notes and savings bonds, selling official checks, paying loans, and processing cash
- Collaborated on the credit risk analysis process when extending credit to personal and business clients
- Consulted with and monitored senior bankers as they sold and processed loans and other financial services

LEADERSHIP & EXTRACURRICULAR EXPERIENCE

Phi Delta Theta, SC Gamma

President

Clemson, South Carolina

December 2022 – Present

- Organize the executive council of 13 members and ensure all operations are being implemented efficiently
- Communicate internal success across the alumni association, national headquarters, and university executives
- Expand and maintain the organization's external network and reputation through positive external relationships
- Implement and develop the internal mentorship program, which connects junior members with the network of 1,000+ alumni and places first year members with upperclassmen to encourage organic mentorship

Phi Delta Theta, SC Gamma

Treasurer

Clemson, South Carolina

December 2021 – December 2022

- Forecasted and tracked variable and fixed costs of the semiannual budget, totaling over \$200.0K in revenue
- Utilized excel proficiency to record transactions, including events totaling \$75.0K in cash flow
- Formulated analysis reports to update the executive and alumni board on the organization's financial status

COMMUNITY OUTREACH, ACTIVITIES & INTERESTS

Global Research Challenge, CFA Institute

- Produce and present initiating coverage report, including thorough financial modeling and qualitative analysis

Volunteer Emergency Room Attendant, Hoboken University Medical Center

- Facilitated emergency room operations including patient scheduling, patient care, and assisting nursing staff

John Henry Gifford

jgiffor@clermson.edu

(864) 436-4918

Education:

- **Clemson University (Clemson, SC; May 2024)**
 - *Bachelor of Science in Financial Management with Real Estate Emphasis and Accounting Minor*
 - Current GPA: 4.0/4.0
-

Experience:

- **Greer Financial Services (Taylors, SC; Summer 2021 – Summer 2023)**
Financial Planning Intern
 - Built a daily-updating interest accrual worksheet to track returns on a real estate investment portfolio.
 - Utilized WealthVision software to emphasize needs for planning adjustments to reach clients' financial goals.
 - Collected reports on over 200 structured products and organized them by client.
 - Spearheaded adoption of CRM system by uploading documents, updating client information, and transferring data on over 900 annuities.
 - Organized, optimized, and integrated client management systems using Excel.
 - Managed an IRA portfolio by actively monitoring market prices, analyst insights, earnings calls, and macroeconomic factors.
 - **Botany Woods Swim Team (Greenville, SC; Summer 2019)**
Assistant Coach and Private Swim Instructor
 - Provided energetic and instructive oversight for young swimmers to prepare them for weekly competitive swim meets, ending the season with a two division-level team promotion for impressive meet performance.
 - **Miscellaneous Volunteer Experience (Greenville and Clemson, SC)**
Aldersgate UMC Assistant Basketball Coach, Grace Church 4th and 5th Grade Boys Group Leader, Clemson Fly-Fishing Club Chauga River Cleanup Participant, Tanglewood Middle School Fly-Fishing Day Instructor
-

Relevant Skills:

- Eastdil Secured Virtual Real Estate Finance Training Program 2022
 - Microsoft Excel
 - Redtail CRM
-

Awards:

- **President's List**
 - Fall 2020, Spring 2021, Fall 2021, Spring 2022, Fall 2022, Spring 2023
- **Merit-Based Scholarship Recipient**
 - Fall 2020 – PRESENT

NOAH PARKER GLOVER

1623 Muscovy Way
Seneca, SC 29678

npglove@clemson.edu

Cellular: 864.650.4695

Education

Clemson University, College of Business
Bachelor of Science in Financial Management
Minor: Accounting, Emphasis: Banking and Investments

Clemson, SC
December 2023

Professional Experience

Aldi

Clemson, South Carolina

Part-Time Associate

February 2022 – Present

- Managed signing and sign program to keep pricing information relevant to customers
- Developed systems for managing overstock of freezer products according to date
- Engaged customers in finding products or reasonable substitutes they required

Chick-fil-A

Clemson, South Carolina

Back of House Restaurant Manager

May 2020 – November 2020

- Directed and supervised kitchen operations including deciding team member positions, overseeing and coordinating simultaneous drive-thru, dine-in and catering service, and stimulating team collaboration and unity, while accounting for unforeseen customer surges, supply shortages, and equipment issues during shifts
- Implemented and executed plans and new programs to lower costs and productivity, while identifying and communicating issues to senior management
- Scrutinized and ensured quality of food, safety, and service to Health Department, ANSI, and Chick-fil-A standards

Back of House Certified Trainer

October 2019 – May 2020

- Assisted the Back of House Restaurant Manager in planning, operations, and adaptation during service.
- Achieved mastery and knowledge of all kitchen positions and procedures
- Administered basic to advanced training programs and new employee mentoring
- Identified and assisted stations and employees that struggle to meet demanding conditions during peak hours

Back of House Hospitality Professional

May 2019 – October 2019

- Performed restocking and basic kitchen operations and services
- Performed multiple different station operations simultaneously during worker shortages and periods of low demand

Magna Interior Seating

Duncan, South Carolina

Data Analyst (Internship)

May 2018 – August 2018

- Collected, assembled and interpreted data from seat assembly lines
- Composed daily spreadsheets detailing and interpreting takt time data
- Designed and implemented solutions that boosted employee safety and productivity

Skills, Activities, & Interests

- Proficiency with Excel, Power Query, Tableau, & Access
- Clemson Finance Club
- Twitch Affiliate and interests in streaming
- Interests in Tennis and traveling domestically and internationally

ALIYAH GRAHAM

405 College Ave, Clemson, SC 29631 | (843) 858-2552 | aliyah4@clemson.edu

EDUCATION

Clemson University – Powers College of Business
Bachelor of Science in Financial Management
Minor: *Accounting* Emphasis: *Corporate Finance*

Clemson, SC
May 2024
GPA: 3.2/4.0

WORK EXPERIENCE

SONOCO PRODUCTS COMPANY
Finance Intern

Hartsville, SC
May 2023 – August 2023

- Lean Six Sigma Blue Belt Certified
- Used two software systems to construct an internal process map for the Rigid Paper Division
- Analyzed and cleaned consumer sales data reports and contract terms

UNITED WAY OF PICKENS COUNTY
VITA Tax Service Intern

Easley, SC
February 2022 – April 2022

- IRS VITA Certified for tax preparation
- Use concise and effective communication to help citizens of the community
- Prepare personal tax returns for underprivileged individuals
- Work in teams of 4 or more to accurately check that taxes were computed correctly

MOG'S CLOTHING BOUTIQUE
Sales Associate

Hartsville, SC
March 2019 – Present

- Utilize customer service skills to create an inviting atmosphere for guests
- Assist with training new employees
- Restock, clean, and maintain outstanding guest services

STUDENT LEADERSHIP EXPERIENCE

MINORITY BUSINESS STUDENT ASSOCIATION
VP of Student Engagement

Clemson, SC
August 2021– Present

- Engage with other members of the executive board to further expand our organization
- Organize and design the organization's social media accounts
- Help the community in our annual Adopt-A-Classroom campaign by providing school supplies to local schools
- Use effective time management and planning skills

ALPHA KAPPA ALPHA SORORITY, INC.
Fundraising Chairman

Clemson, SC
May 2022 – Present

- Plan fundraising events for the organization to benefit the college community
- Organize committees into different groups based on specified events
- Budget for fundraising giveaway prizes and chapter events

ACTIVITIES

TIGER TIES 1:1 MENTORING
Mentee

Clemson, SC
September 2022– Present

- Organize and facilitate meetings with a mentor to plan out semester objectives and goals
- Network with other Clemson alumni to establish key relationships

CLEMSON DANCERS ORGANIZATION
Group member

Clemson, SC
August 2020 – May 2021

- Plan and use efficient time management to produce our Spring showcase
- Practice for 3 hours out of the week, while maintaining academic excellence

AWARDS

Palmetto Fellow

Fall 2020 – Present

Matthew Haase

236 Willow Ct., 86
Central, SC 29630

<https://www.linkedin.com/in/matt-haase/>

mjhaase10@gmail.com

540.429.5271

EDUCATION

Clemson University - Wilbur O. and Ann Powers College of Business

Clemson, SC

Bachelor of Science in Financial Management

Graduation Date: Dec 2023

Accounting Minor, Commercial Banking and Investments Emphasis

- Honors: President's List - Fall 2022
- Relevant Coursework: Financial Management I&II, Intermediate Accounting I&II, Cost Accounting, Investment Analysis, Portfolio Management, Financial Institutions, International Financial Management

WORK EXPERIENCE

Wells Fargo Commercial Bank

Austin, TX

Middle Market Banking Intern

June 2023 – Aug 2023

- Analyzed current clients' financial statements and reported findings in annual credit reports
- Conducted industry research and compiled findings for both current and prospective clients
- Supported relationship managers in client interactions, participating in client meetings, and handling client profile updates using meeting notes

Clemson University Athletic Services

Clemson, SC

Tutor

Jan 2023 – May 2023

- Tutored student-athletes in macroeconomics and finance and captured progress through written reports
- Assessed individual student needs and implemented individualized learning strategies

99Arthur M. Spiro Institute for Entrepreneurial Leadership

Clemson, SC

Analyst in Residence

Jan 2022 – May 2022

- Worked with student entrepreneurs to help develop, improve, and launch product lines and businesses
- Led research project on Name-Image-Likeness risks and developed proposal for risk reduction policies

United States Army

Various Locations

Personnel Director

June 2012 – Aug 2019

- Managed the travel, training, and human resource offices
- Recognized for driving company HR metrics from the bottom 10% of the Pacific region to top five
- Facilitated weekly review meetings and presented HR updates to leadership
- Advised company leadership regarding personnel issues and DoD compliance requirements
- Managed 10 personnel and administered monthly individual performance reports
- Analyzed combat simulations and outlined results in written reports for senior leadership

EXTRACURRICULAR

Clemson University Stock Club

Clemson, SC

Treasurer

Sep 2021 - Present

- Prepare and present annual budget requests
- Lead discussion topics on a variety of stock market-related topics

Clemson University Student Funding Board

Clemson, SC

Board Member

Oct 2019 – Dec 2020

- Served on a 15-person board to oversee the allocation of the student activity fee (approx. \$1.5 million)
- Evaluated financial requests to ensure legitimacy and fiscal accountability

SKILLS

Microsoft Excel, Financial Analysis, Planning, Problem Solving, Communication, Financial Modeling, Teamwork, Bloomberg Terminal

Ryan Haley

Current Address
Clemson, SC 29631

Permanent Address
Shrewsbury, MA 01545

(774) 275-7580 | ryan.haley1129@gmail.com | <https://www.linkedin.com/in/ryan-haley-638604205/>

EDUCATION:

Clemson University, Wilbur O. & Ann Powers College of Business
Bachelor of Science in Financial Management
Emphasis: Real Estate
GPA: 3.9/4.0

Clemson, SC
May 2024

SKILLS:

Microsoft Office Applications
Financial Accounting (GAAP)
Public Speaking

Real Estate Valuation
Project Management
Financial Management

Real Estate Investment
Asset Management
Investment Analysis

EXPERIENCE:

DRAPER

Cambridge, MA

BUSINESS MANAGEMENT INTERN

5/23 – 8/23

- Optimize asset management by consolidating information from various software applications.
- Conduct a cost analysis project for IT department, presenting actionable insights to director.
- Interact directly with vendors to gather quotes and facilitate accurate budgeting.
- Support unclassified and closed room project managers in developing timelines, plans, and with project execution.
- Assist with annual accruals and gathering data necessary for building financial statements.

CUNNINGHAM & ASSOCIATES LLC

Worcester, MA

FINANCE INTERN

06/22 – 8/22

- Develop payroll spreadsheets to analyze eligibility for tax retention credits.
- Identify improvement changes within internal processes and procedures for the company.
- Gather necessary information from clients to prepare financial statements.
- Develop Excel and Google spreadsheets to identify business revenue and margins.

NACHO MAMAS TOWSON

Towson, MD

EXPEDITOR

09/21 – 5/22

- Manage multiple food runners, assigning tasks and setting priorities
- Handling customer complaints from the front-house
- Overseeing all products that leave the kitchen, ensuring overall kitchen efficiency

VOLUNTEER EXPERIENCE OR LEADERSHIP

- Volunteer as an assistant youth lacrosse coach for local youth lacrosse program
- Annual Veterans Memorial 5k Road Race and Walk to benefit Veteran's Inc. attendee
- Four years of experience as a lead summer camp counselor at Teamwork's Northborough managing upwards of 30 campers at a time

ACTIVITIES, AWARDS, AND INTERESTS

- Activities: Clemson University Men's Club Lacrosse (includes community service & fundraising)
- Awards: Towson University & Clemson University Dean's List Fall '20 – Spring '23

Mary Haney

Charlotte, NC 28036 | mkhaney@clemson.edu | (203) 295 5019 | <https://www.linkedin.com/in/mary-haney>

Education

CLEMSON UNIVERSITY

*Bachelor of Science in Financial Management, Minor in Accounting
Emphasis in Corporate Finance*

May 2024

GPA: 3.31/4.00

AMERICAN UNIVERISTY OF ROME

Study abroad

May – August 2022

Rome, Italy

Experience

STATE FARM

Community Outreach Intern

Clemson, SC

May 2023 – Present

- Cultivated business partnerships to build lasting relationships with external parties.
- Developed and implemented marketing strategies based on company objectives and trends.
- Created marketing policies and procedures, evaluating, and revising to maximize team efforts.
- Grew social media engagement by 20%.

CLEMSON ATHLETICS

Gameday Attendant

Clemson, SC

January 2022 - Present

- Responsible for the friendly, organized, and efficient operations of the athletic events in Clemson.
- Collaborated with various teams and departments to transfer materials in a systematic and methodical manner.
- Operated guest service stands providing customer service to attendees.

STYLEXCHANGE

Inventory Manager

Charleston, SC

August 2020 - December 2020

- Communicated openly across departments to verify and correct inventory counts.
- Directed inventory related operations, delegating tasks to other employees as necessary.
- Systemized inventory to keep an efficient and organized storage area.
- Monitored inventory levels in store and replenished stock when need be.

Involvement

SIGMA KAPPA SORORITY

Active Member

Clemson, SC

September 2021 – Present

CLEMSON CHICK-FIL-A CLUB

Treasurer

Clemson, SC

August 2023- Present

Skills

- Computer Proficiency (MS Office/Excel)
- Leadership Experience
- Problem Solving
- Interpersonal Communication
- Organization
- Data Analysis
- Time Management
- Attention to detail

Elijah Harris

evharri@g.clemson.edu | 301-742-5297 | www.linkedin.com/in/elijahvharris/

EDUCATION

Clemson University **Clemson, SC**
Bachelor of Science in Financial Management, Minor in Accounting *May 2024*

RELEVANT WORK EXPERIENCE

Cherry Bekaert **Rockville, MD**
Tax Intern *June 2023 - July 2023*

- Helped prepare and review tax returns for individuals, businesses, or other entities. Consolidated financial data, input information into tax software, and verified accuracy of calculations.
- Conducted tax research to assist the tax team in staying updated with current tax laws and regulations.
- Assisted with the preparation of tax-related documents. Organized client files and documentation in accordance with the firm's record-keeping procedures.

TigerLive **Clemson, SC**
Treasurer *April 2023 - Present*

- Managing a budget of \$113,229.00
- Tracking income and expenses, ensuring the organization's financial resources are used effectively.
- Keep accurate records of all transactions and prepare financial reports for Clemson University

ESES Group LLC **Olney, MD**
Property Management Intern *June 2018 - August 2021*

- Assisted in the acquisition, management, and sale of private residential properties (single and multi-family)
- Used multiple online platforms to help advertise lease and manage properties.
- Experience working with 8 rental properties, housing renovation and repair trades, from planning and overseeing full property renovations to managing routine preventive maintenance and repairs.

UpmostBrands **Olney, MD**
Founder *August 2016 - June 2020*

- Created and managed a successful online retail business with over \$500 per month in sales.
- Responsible for inventory acquisition, market research, advertising, sales, and shipping
- Communicated with customers, answered questions, resolved disputes, and provided further details.
- Maintained a 4.9/5-star rating for 4 years.

OTHER WORK EXPERIENCE: **Target** - Guest Advocate, 2020 | **CVS Pharmacy** - Store Associate, 2021

CAMPUS INVOLVEMENT

Clemson Rugby **Clemson, SC**
Fullback/Winger *August 2020 - Present*

- Competing in the highest collegiate Rugby League
- Dedicating 15 hours per week towards weight training and practices

WSBF-FM Clemson **Clemson, SC**
Intern *January 2023 - Present*

- Host and produce a captivating radio show every Sunday.
- Prepare and research content, curate playlists, conduct interviews, and interact with listeners.

EAGLE SCOUT RANK **Olney, MD**
Boy Scouts of America - Troop 264 *July 2019*

Calvin Heberlein

617-775-1490 | calvinheb@gmail.com

Education

CLEMSON UNIVERSITY

Bachelor of Science: Financial Management

Minor: Accounting

Active Member of the Investment Research Club and Finance Club

May 2024
GPA: 3.48/4.0

Work History

INTERN, AMERIPRISE FINANCIAL

5/2023 - 8/2023

- Published goals-based financial plan to fulfill the Ameriprise online client experience
- Created in depth expense analysis for clients as part of their pre-retirement preparation
- Contacted over 500 clients to promote informational webinars conducted by the practice
- Assisted in a diverse multitude of tasks relating to business expansion into the tax preparation service including but not limited to technology setup, website design, vendor and utility management, software research, and service model outline
- Calculated inherited IRA RMDs for clients
- Participated in group discussions and research regarding other tax service prep models and discussed how we would learn from that while ensuring we maintain our branded experience

LOAN CLERK, MIDDLESEX SAVINGS BANK

5/2022 - 8/2022

- Reviewed, processed, closed, and administered loan forgiveness applications and payments
- Created delinquent non-escrow real estate tax reports for properties used as collateral
- Developed excel spreadsheets of important information related to loans
- Determined and processed payment schedules for loans
- Processed and uploaded legal documents related to delinquent loans

SEASONAL SALES ASSOCIATE, VOLANTE FARMS

11/2017 - 8/2023

- Engaged with customers, effectively building rapport and lasting relationships
- Prepared merchandise for the sales floor by pricing, labeling, and displaying items
- Solved customer challenges, offering relevant products and services

Skills and Abilities

- Bloomberg Terminals
- Leadership
- Customer relations and sales
- Multitasking and adaptability
- Microsoft Office Suite
- JMP Statistical Software

Community and Professional Development

NATIONAL BUSINESS CLUB | DECA

9/2016 - 6/2020

- Mentored first year members by preparing them for the competitions
- Competed in national business competitions

VOLUNTEER | NEWTON FOOD PANTRY

6/2016 - 8/2017

- Participated in food drives by raising money, buying food at the grocery store, and distributing food
- Helped stock and organize the food pantry

VOLUNTEER | YMCA

4/2015 - 6/2018

- Cleaned up and revamped public baseball fields and YMCA facility for community use
- Participated in yearly door to door fundraisers for high school football and baseball teams

Alexander Hill

3 Golf View Drive, Hingham, MA, 02043 | 781-974-3974 | alexhill920@gmail.com

Employment History

Workplace Investing Sales Intern at Fidelity Investments, Boston, MA

June 2023 — August 2023

- Worked on an innovation deployment project where I assisted in deploying new technology for account executives to use in the sales process
- Reworked and updated the Workplace Investing Sales SharePoint site
- Presented both projects to the senior leadership team

Insurance Sales Intern at Aflac, Quincy, MA

June 2022 — August 2022

- Performed a four step process of prospecting, appointment setting, presenting, and closing
- Passed the Accident and Health or Sickness Insurance exam

Wealth Management Intern at Capital Analysts of New England, Braintree, MA

June 2021 — August 2021

- Successfully made warm calls to prospective clients to meet with an advisor
- Ran weekly investment reports using the Morningstar Advisor Platform
- Observed wholesale meetings and client conversations
- Assisted an advisor with a PowerPoint presentation used to teach a retirement class

Education

Bachelor of Science in Financial Management (Emphasis in Financial Planning) | Minor: Accounting, Clemson University, Clemson, SC

August 2021 — May 2024

- CFP board-registered program
- Relevant coursework: Risk & Insurance, Estate Planning, Excel Applications in Finance, Investment Analytics, Cost & Tax Accounting
- Cumulative GPA: 3.9/4.0

Finance, Providence College, Providence, RI

August 2019 — December 2020

- Spent a year and a half at PC before transferring to Clemson University
- Cumulative GPA: 3.2/4.0

Leadership

Wall Street South Investment Club - Executive Board, Clemson

Financial Planning Association - Vice President, Clemson

Hingham High School Track - Sprinting Captain

Other Experience

Summer Camp Counselor at Hingham Recreation Center, Hingham, MA

May 2014 — August 2019

William Hilton

B.S. Financial Management Student

Contact

8889 Moat Crossing Pl
Bristow, VA 20136
571-882-0523
WilliamHilton13@gmail.com

Education

Clemson University
B.S. in Financial Management
Real Estate Emphasis
Dec 2023 Grad
Dennis R Leyden Memorial
Scholarship Recipient
Clemson Merit Scholarship
Recipient
GPA 3.61/4.00

Key Skills

Microsoft Office
Procore Software
Clearview Software
Bluebeam Software
Organization
Communication
Detail Orientation

Objective

Detail-oriented and motivated Dec 2023 graduate with a degree in Financial Management. Demonstrated aptitude in business management through internships with a construction contractor and hands-on experience in accounting. Proven ability to analyze financial data, implement process improvements, and contribute to efficient project execution. Strong communication skills, coupled with a proactive approach to problem-solving. Eager to leverage academic knowledge and internship exposure to contribute to the success of a dynamic organization.

Experience

SUMMER 2023

Project Management Intern | LF Jennings, Inc

- Played an integral role in supporting the planning, execution, and monitoring of diverse construction projects, including working on general contracting side as well as with self-performed masonry division.
- Demonstrated proficiency in Procore software by streamlining project tracking, reporting, and communication processes, as well as Bluebeam software.
- Worked alongside subcontractors to promote efficiency and ease of work by managing submittals, RFI's, and site logistics.
- Tracked and produced weekly production analysis and reports for masonry division.

SUMMER 2022

Accounting Intern | Wetlands Studies & Solutions, Inc

- Developed knowledge of Clearview accounting software including designing and running reports to pull data and backup requested by clients for invoicing.
- Assisted in extraction and preparation of data for migration into new software.
- Collaborated with auditors to pull requested reports and data from software and present organized data to auditing team.
- Reconciled bank statements, invoiced clients, adjusted employee timesheets, logged entries in journal, organized master service agreements.

Certifications

Procore Software | Certified: Project Manager (Core Tools)

MICHAEL J. HORN

(908)-229-3796 • mhorn3007@gmail.com • <https://www.linkedin.com/in/michael-horn-6b925b221>

EDUCATION

CLEMSON UNIVERSITY, Wilbur O. and Ann Powers College of Business

Clemson, SC

Bachelor of Science, Financial Management

May 2024

Emphasis in Financial Planning, Minor in Accounting

GPA: 3.33/4.0, Dean's List

WASHINGTON COLLEGE

Chestertown, MD

GPA: 3.71/4.0, Dean's List

August 2020-May 2021

Recipient of the Founders Scholarship

Division 3 Baseball Recruit, Centennial Conference

EXPERIENCE

LPL FINANCIAL

Remote

Paraplanning Intern

May 2023-August 2023

- Generate financial plans to be delivered to dozens of clients of the firm
- Assigned MRD Projects to input data to client portfolios
- Developed presentations showing client asset timelines and the suggested adjustments to be made to extend asset life
- Organize company-wide calls daily, aiding plan managers and plan associates to deliver our product to financial advisors in a timely-manner

TRANQUILLI FINANCIAL ADVISORS

Clinton, NJ

Financial Analyst Intern

May 2022-August 2022

- Prepared analysis of webinars and investment products
- Conducted market intelligence
- Presented data analysis and reports for management
- Shadowed head advisor and collaborated with high networth clients

VECTOR MARKETING

Flemington, NJ

Sales Representative

May 2021-August 2021

- Prospected new customers through live sales strategies
- Scheduled appointments, demonstrated culinary products, and submitted orders
- Participated in team meetings and reviewed results with sales managers

WALL STREET SOUTH INVESTMENT CLUB

Clemson, SC

General Member

August 2022-Present

- Survey market intelligence, strategizing market entries to generate a high return portfolio
- Manage a team in the Bloomberg Global Trading Challenge
- Engage in monthly club meetings presented by well-known industry professionals

SKILLS/ACTIVITIES

Professional Licenses: Securities Industry Essentials (SIE)

Technical: Spanish State Seal Biliteracy, Microsoft Office Suite, WealthVision, MoneyGuidePro


Achievements: Recipient of Woody Halsey Memorial Scholarship, Tailgate Chair of Pi Kappa Alpha Fraternity-Eta Alpha Chapter, Clemson University, Challenger Baseball Coach through Clemson Life Program


Interests: Guitar Enthusiast, Strength Training, Shark Fishing


TRENT HOWARD

CLEMSON FOOTBALL SCHOLAR-ATHLETE

 <https://www.linkedin.com/in/trent-howard-46a1a3201/>

 (205)-568-3866

 trentjhoward@gmail.com
trenth@clemson.edu

 Clemson, SC

EXPERIENCE

FIRST RATE INTERN

London, UK | May 2023

- Learned about wealth technology software
- Assisted in managing global client relations
- Became competent in global portfolio diversification
- Gained an understanding in portfolio analysis

CREDIT SUISSE INTERN

New York, NY | May 2022

- Shadowed experienced sales and trading professionals
- Gained an understanding of the different roles on the trading floor

SOUTHERN FIRST- COMMERCIAL BANKING INTERN

Greenville, SC | July 2021

- Worked with clients to provide commercial banking solutions and retail financing plans
- Responded to customer questions and concerns

RAYMOND JAMES FINANCIAL ADVISING INTERN

Birmingham, AL | May 2021

- Worked with clients to provide investment products and solutions to meet financial goals
- Gained an understanding in wealth management practices

CLEMSON FOOTBALL

Football Scholar-Athlete

2020 - Current

- Atlantic Coast Conference Champion 2020,2022
- P.A.W. Journey Ambassador 2020-Present
- P.A.W. Journey is a leadership initiative promoting personal and professional growth. Ambassadors are selected to lead as a representative of Clemson Football and to serve as a liaison to the program

EDUCATION

CLEMSON UNIVERSITY

- Bachelor of Science in Financial Management and Minor in Accounting
- Emphasis in Commercial Banking and Investments
- December 2023
- Financed 100% of College with an athletic scholarship
- ACC Academic Honor Roll 2020-2022

BRIARWOOD CHRISTIAN HIGH SCHOOL

- College Prep Diploma Class of 2020
- Member National Honor Society
- Graduated with 4.0 GPA

SKILLS

- Leadership
- Work Ethic
- Teamwork
- Time Management
- Proficient on the Bloomberg Terminal

COMMUNITY INVOLVEMENT

- Dabo's-ALL IN Foundation Ladies Clinic
 - Supported fundraising efforts for Breast Cancer Research through speaking to over 2,000 clinic participants
- Team Financial Literacy
 - Created presentations and presented to help student athletes manage money and navigate through modern day financial challenges
- Habitat for Humanity
 - Helped construct homes with the Habitat for Humanity charity and landscaping jobs for the lots of the homes while being able to minister

Tanner Hroblak

Email: Hroblakt2@gmail.com Phone: 732-904-9971

EDUCATION

Clemson University, Wilbur O. and Ann Powers College of Business
Bachelor of Science in Financial Management
Minor: Accounting, Emphasis: Commercial Banking and Investments
Cumulative GPA: 3.53 / 4.00

Clemson, SC
May 2024

WORK EXPERIENCE

Tradition Financial Services

Rotational Intern

New York, NY
Summer 2023

- 4-week rotational internship program. Observed brokers and participated in mock brokerage sessions.
- Rotated through 14 desks and observed brokers work as a team, actively communicating and trading with clients.
- Learned about different products, floor terminology, and the necessary mindset to succeed as a competitive broker.
- Began preparing for the Securities Industry Essentials Exam.

Mazur & Associates CPAs and Business Advisors PC

Accounting Intern

Middletown, NJ
Summer 2022

- Designed client blog posts about current events related to the economy and the firm.
- Managed client relations by contacting clients, updating online files, and scheduling and confirming appointments.
- Performed excel sheet organization by creating spreadsheets of hundreds of clients with tools to easily sort different types of information.
- Performed general firm organization. Updated client files and book keeping.

Cracked Olive

Market place assistant

Holmdel, NJ
Fall 2020

- Organized products and inventory in a first-in first-out order to achieve maximum efficiency.
- Delivered orders in a timely manner to customers.

LEADERSHIP and SERVICE

Delta Chi Fraternity

Social Chair

Clemson, SC
Spring 2023-Present

- Develop relations with other chapters, plan and organize events, and manage risk.
- Communicate, network, and collaborate with outside organizations and entertainment companies.
- Plan and participate in our Christmas-time Jimmy V Foundation philanthropy event.

Middle School Flag Football Coach

Head Coach

Hazlet, NJ
Fall 2017-Fall 2020

- Organized and ran practices and games, created plays, taught necessary skills, and managed parent relations.

Youth Basketball Camp Counselor

Camp Counselor

Holmdel, NJ
Summer 2017-Summer 2018

- Taught basic basketball fundamental skills to grade school children. Organized and ran drills and games.

ACTIVITIES, AWARDS, AND INTERESTS

Activities: Wall Street South Investment Club, Clemson Finance Club, Highschool baseball player.

Skills: Bloomberg, Excel, accounting, problem solving, communication, organization.

Interests: Golf, football, painting, kayaking.

Nicholas Grant Hubbard

757-567-1179 | nghubbard20@gmail.com | <https://www.linkedin.com/in/nickhubbard20/>

OBJECTIVE

Motivated, aspiring finance major with strong interpersonal skills honed through education and diverse work experience seeks a challenging opportunity within the financial services industry.

EDUCATION

Clemson University Honors College, Clemson, SC May 2024
Bachelor of Science – Financial Management, Concentration in Corporate Finance 3.96/4.0 GPA
Minors – Accounting, Management Information Systems

EXPERIENCE

Internal Audit Summer Analyst- J.P. Morgan Chase & Co. June 2023- August 2023

- Analyzed and identified risks within the consumer and community banking line of business and evaluated and tested controls to mitigate those risks.
- Researched business processes, interviewed stakeholders, and utilized data analytics to prepare decisive final audit reports.
- Executed and co-lead a complete audit of the Chase Mobile App within a case study team.

Mergers and Acquisitions Intern – Tide Rock Holdings May 2022- August 2022

- Performed and supported all aspects of the due diligence process including financial forecasting, industry analysis, and risk identification/mitigation.
- Screened and qualified new investments through analysis of divestiture posture, ownership structure, profitability, actionability, and growth strategy.
- Gathered data and wrote reports on prospective targets, industries, and markets via secondary and primary source research within the middle market private equity space.
- Utilized company database and software platforms to track, monitor, and manage pipeline deal flow and prospect investor processes.

Commercial Real Estate Intern – S.L. Nusbaum Realty May 2022- August 2022

- Performed financial analysis of private asset management, commercial leasing and management, corporate marketing, and multifamily property management.
- Developed reports and analyzed quantitative and qualitative data to assist brokers in commercial real estate transactions and acquisitions.

HONORS AND ACTIVITIES

- Selected to the Goldman Sachs Summer Virtual Insight Series 2022
- Co-founder of the Clemson Breaking into Business Club 2022
- Academic Chair of the Alpha Tau Omega Fraternity 2021-2022
- Inter-fraternity Council Honor Court 2021-2022
- Clemson University Wall Street South Investment Club 2021-2023
- Clemson University Entrepreneurship Club 2020-2023
- Clemson University Finance Club 2022-2023
- President's List, Clemson University 2020-2023

Donald Huber III (Trey)

Annapolis, Maryland 21146 · 443-615-5666 · dshuber@clemson.edu

Education

Clemson University Honors College Clemson, SC
Bachelor of Science in Financial Management Spring 2024
Minor in Accounting GPA 3.72/4.0

The Severn School Annapolis, MD
Honor Roll, Headmasters List, National Honors Society, Investment Club Leader 2016 - 2020

Work Experience

Client Services at Alpha Sights New York, NY
Summer Associate June 2023 – August 2023

- Worked 55 hours a week handling client relationship within the private equity book of business
- Recruited industry experts for the largest private equity firms amongst their investment analysis
- Personally grossed ~ \$50,000 USD in my 10 weeks on the desk

Teacher Assistant for Clemson University Clemson, SC
Teacher Assistant for Business Statistics August 2022 - Present

- Worked 10 hours a week during academic semester and graded lab assignments
- Attended class/lab and held office hours outside of class to help students master the course material which includes using JMP statistical software to analyze data

Go Melvo Snowballs Annapolis, MD
Location Manager Summers 2016 - 2022

- Handled transactions of snowcones and beverages of up to \$1000 per day
- Managed sales and location logistics in the Annapolis area

Extracurriculars

Phi Sigma Kappa Fraternity Clemson, SC
Academic Chair/Professional Development Chair/Judicial Board 2021 - Present

- Elected to tutor members in the fraternity and to enhance academic achievement
- As Academic Chair, helped bring the average GPA of Phi Sigma Kappa from last to second in one year among all campus fraternities
- Raised more than \$9,000 to support Special Olympics South Carolina
- Participated in various community service projects to benefit the Clemson Community
- Organized LinkedIn interview workshops for members of the fraternity

Order of Omega Clemson, SC
Vice President of Academics 2021-Present

- Elected to an executive position in Clemson's elite honors society made up of the top 5% of the FSL community

Wall Street South Investment Club/Clemson Finance Club Clemson, SC
Active Member August 2022-Present

- Managed/invested a \$100,000 mock portfolio throughout the year
- Attended trading room sessions to utilize the Bloomberg financial marketing machines

Beta Alpha Psi Clemson SC
Candidate/Social Committee August 2022 – May 2023

- Accepted member into Clemson's prestige finance and accounting honors society
- Prepared/organized professional events weekly with presentations from large accounting firms

Brett Hugo

Easton, CT 06612 | bhugo@clemson.edu | 203.767.4701

EDUCATION

Clemson University, Wilbur O. and Ann Powers College of Business

Bachelor of Science in Financial Management

Emphasis: *Corporate Finance*

Minor: Economics, Accounting

Clemson, SC

May 2024

GPA: 3.92/4.00

PROFESSIONAL EXPERIENCE

Concord Health Partners

Summer Analyst

Summit, NJ

May 2023-August 2023

- Extensive research in the healthcare and healthtech industry, specifically growth stage healthtech companies seeking series A, B, and C funding
- Developed in depth one-page profiles, competitive landscapes, and utilized precedent transactions and public comps to create an accurate valuation of portfolio companies
- Sourced hundreds of potential companies that met Concord's investment criteria including round size, business model, and ARR
- Listened in on investment committee meetings, and all processes involving the deal team including investment decisions that were made from key drivers like revenue growth and customer opportunities

Fairfield County Bank

Retail Banking Position

Ridgefield, CT

May 2022-August 2022

- Assisted bank managers with client and customer responsibilities throughout various locations in Fairfield County
- Awarded most outstanding intern for being the most reliable, efficient, and self-reliant

Luminae Partners LLC

Internship

Westport, CT

June 2022

- First hand experience of the day-to-day responsibilities of a Director at a private equity company
- Insightful knowledge on the private equity and hedge fund side of finance

Mail Delivery and Courier Services

Executive Vice President

Shelton, CT

December 2020-Present

- Trained and knowledgeable on the responsibilities of deliveries and routes for each employee
- Optimized three delivery routes to increase efficiency and trained three new employees
- Provided input and held discussions around key business decisions involving daily operations, warehousing responsibilities and customer satisfaction
- Sourced new opportunities and created in depth delivery routes for potential customers
- Handled transition of new office administration by handling payroll duties, paying bills, and developing a new log on excel to keep track of daily inbounds, outbounds, and deliveries

LEADERSHIP ACTIVITIES

Scholars of Finance Club, Clemson University

Co-Founder & Vice President

Clemson, SC

August 2022-Present

- Co-founder of the Clemson Chapter and serve as VP. Coordinate member recruitment and guest speaker presentations

Treasurer

The Delta Chi Fraternity

Clemson, SC

December 2021-December 2022

- Effectively managed \$150,000 budget utilizing Excel
- Responsible for coordinating the collection of dues from 110 members
- Handled budgeting and financing activities including paying monthly bills and tracking financial expenses
- Created a resolution that eliminated over \$30,000 of debt that was owed to the fraternity house owner due to missed rent payments

National Organization for Rare Disorders

Lead Fundraiser

Easton, CT

August 2019-November 2019

- Organized groups into 10 man teams and created a schedule by date, time, and customer
- Surpassed our fundraising goal of \$1,000 by \$800

ADDITIONAL INFORMATION AND INTERESTS

- Scholar Athlete Award in the state of Connecticut in 2020
- Most Outstanding Year One Leader - Wilbur O. and Ann Powers College of Business at Clemson University
- FMC Level I Certification from Adventis Financial Modeling Course
- Chess, pick-up basketball, golf, hiking, New England Patriots Football

Thomas W Hyche

Greenville, SC | Clemson, SC
(864)593-4688 | thyche19@gmail.com | LinkedIn- Thomas Hyche

EDUCATION

Clemson University- Wilbur O. and Anne Powers College of Business **Clemson, SC**
Bachelor of Science in Financial Management May 2024
Minor: Accounting, Emphasis: Commercial Banking and Investments

- Cumulative GPA: 3.58/4.0 Major GPA: 3.6/4.0

WORK EXPERIENCE

Elliott Davis, LLC **Charlotte, NC**
Transaction Advisory Consulting Intern *June-Aug 2023*

- Assisted in financial due diligence for mergers and acquisitions.
- Conducted research and analysis to support financial valuations.
- Assisted in the preparation of client reports and presentations.
- Prepared and presented Financial Statements.
- Gathered and transformed raw data into tables, graphs, and charts.

V.M. Manning & Co., Inc. **Greenville, SC**
Summer Analyst *May 2021*

- Performed industry research, grouped different potential investments, and provided support and assistance to Wealth Management Advisors.
- Researched potential investments and presented performance reports with regards to investment projections and market risks.

Bell, Carrington, Price & Gregg, LLC **Greenville, SC**
Clerk *May-Aug 2022 & June-Aug 2021*

- Organized and inventoried closing documents.
- Maintained and improved the office space.
- Participated in and witnessed real estate closings.
- Filed Deeds and Titles.

Greenville Country Club Tennis **Greenville, SC**
Tennis Coach & Sales Assistant *June-Aug 2019*

- Coached children in tennis and led summer tennis camps.
- Assisted with sales in the Tennis Pro Shop and coordination of events.

ACTIVITIES

Wall Street South Club

- Regularly discuss current events in the market and make predictions about the market and economic trends.
- Host guest speakers, including Clemson Finance Alumni, who share their experiences and answer questions.

Clemson Flying Club

- Attend monthly meetings to discuss aviation-related topics.
- In the process of obtaining a Pilot's License through the club.

Kappa Alpha Order Philanthropy Committee

- Help plan and organize the Thomas H. Few Cookout and Thomas H. Few Memorial Cocktail.
- Played a key role in organizing successful fundraising events and cultivating partnerships within the community.

AWARDS & ACHIEVEMENTS

-
- Bloomberg Market Concepts Certification**
 - Dean's List:** Spring 2021, Fall 2021, Spring 2022, Fall 2022, and Spring 2023

ADDITIONAL SKILLS & INTERESTS

Skills: Microsoft Excel, Microsoft PowerPoint, Microsoft Word, Power Query, QuickBooks
Interests: Finance, Clemson Football, Golf, Outdoors

J'unique Jaime

Email: junique.jaime@gmail.com | Mobile: 480.363.4183 | LinkedIn: www.linkedin.com/in/juniquejaime

EDUCATION

Bachelor of Science in Financial Management, Minor in Accounting
Emphasis in Corporate Finance
Clemson University, Cumulative GPA: 3.59/4.0

May 2024

EXPERIENCE

Finance and Accounting Intern

Techtronic Industries (TTI)

June – August 2023

Fort Lauderdale, FL

- Directed working capital management project in which the annual indirect vendor spend among six business units was analyzed
- Identified 215 vendors with inconsistent payment terms across different business units, totaling to approximately \$1 billion in spend
- Reviewed previous audit procedures for improvement of insurance claims and implemented audit planning

Calculus Tutor

Clemson University-Self Employed

January 2022 – May 2023

Clemson, SC

- Developed extensive weekly lesson plans and learning strategies for students, resulting in a 15% increase in exam scores
- Gathered data to generate reports of students' academic data and track progress

Sales Innovation Program

Clemson University

January-December 2022

Clemson, SC

- Networked with over 16 partner companies ranging from technology industries to financial services strengthening communication skills and professional development
- Participated in pitch competitions and attended industry workshops to strengthen business acumen and diversify knowledge of industry practices

International Student

Study Abroad

June 2022

Rome, Italy

- Immersed in European culture, alongside 60 peers, resulting in an increased understanding of social differences
- Engaged in university curriculum while developing comparisons of U.S. and Italian studies/work ethic to enhance cultural adaptability
- Managed ambiguity through daily activities leading to greater circumstantial flexibility

SKILLS AND RELEVANT COURSES

- Microsoft Office (Power BI, Excel, PowerPoint, Word)
- Experience in Python Programming
- Management of Information Systems
- Detail-Oriented
- Strong Communication Skills
- Coachable

Whit Jasinski

Columbia, SC | 803-605-0577
pjasins@clemson.edu

Education

Clemson University, Clemson, SC

May 2024

Bachelor of Science in Financial Management

Accounting Minor | Financial Planning Emphasis

- LIFE Scholarship and SCBA Scholarship Recipient
- 3.04/4.00 GPA

Work Experience

Entrepreneur

2018-2022 (Summer Job)

Whit Will Help

Chapin, SC

- Promoted through flyers and public relations
- Provided dozens of loyal clients with yard care and interior contracting. Including power washing, grass cutting, weed eating, snow shoveling, painting, and fixture repairs
- Mapped income-generating strategies and used Excel to track cash flows

Clemson University Athletics Department

May 2023-Present

Athletic Grounds Associate

Clemson, SC

- Provided maintenance for and around Clemson Athletics fields and facilities

Bi-Lo

Aug 2018- May 2020

Sales Associate

Chapin, SC

- Maintained store visual appeal and promoted merchandise
- Provided positive first impressions to welcome existing/potential customers.
- Helped hundreds of customers per day with grocery checkout and various other needs

Skills and Certifications

- Career Ready: Professional Development Certificate
- Microsoft Office
- Motivating Team Leader
- Tableau and Bloomberg Software
- Ambitious Goal Setter
- Google Apps

Leadership Experience

- Elder and Lead Representative of Youth Congregation at Lake Murray Presbyterian Church
- Captain of High School Basketball Team
- Clemson University Finance Club

Evan Johnson

(574) 575-8859 · ehj3@clemson.edu · 123 Sloan Street Apt. 4 Clemson, SC 29634

EDUCATION

Bachelor of Science in Financial Management

May 2024

Bachelor of Science in Management

Clemson, SC

Clemson University

GPA: 3.78/4.0

Minor: Accounting, Emphasis: Real Estate, Emphasis: Human Resource Management

President's List

Spring 2021, Spring 2022

Dean's List

Fall 2020, Fall 2021, Fall 2022, Spring 23

WORK EXPERIENCE

Restaurant Accounting Intern

May 2023- August 2023

Chick-Fil-A Support Center

Atlanta, GA

- Consulted locations nationwide with financial accounting reports and helped trained operators to streamline accounting process.
- Automated a workflow through Alteryx to eliminate monthly reporting of remodels within the restaurants.

Senior Alumni Engagement and Outreach Intern

Jan 2023- Present

Beta Upsilon Chi Foundation

Clemson, SC

- Database management of over 5,000 records in Salesforce.
- Designed a performance review plan for alumni organizations.
- Manage a team of interns to help develop them in their skills.

Data Analytics Summer Intern

May 2022- August 2022

Elevation Church

Charlotte, NC

- Data collection and aggregation on 11 YouTube Channels, including 3 that serve an international market.
- Performed predictive and prescriptive data analytics on all 11 channels.
- Designed and executed a 12 Week experiment that analyzed various aspects of YouTube videos and their impact on the performance of the videos. Increased the views on these videos by 26%.

Manager

June 2015- May 2022

Merry Me Events

Edwardsburg, MI

- Coordinated efforts to establish and deconstruct atmospheres for parties, events, and weddings.
- Lead a project systematizing inventory processing and logistical organization across a multitude of warehouses.
- Trained new employees on standard operating procedures.

LEADERSHIP EXPERIENCE

Distinguished Ethics Scholar Program

Spring 2021-Present

Clemson University

Clemson, SC

- Selected by the Rutland Institute of Ethics to participate in a rigorous, in-depth training in ethics, especially in the business context. Participated in educating peers on ethical decision making and impacts of unethical behavior.

External Vice President

Jan 2022- Dec. 2022

Beta Upsilon Chi- Brothers Under Christ Fraternity

- Create and establish events including philanthropies, outreach events, and social events.
- Network and connect with other organizations across campus.

Skills

Office Suite

Alteryx

Adobe Photoshop

Tableau

Sales Force

Power BI

Zachary Kaim

zkaim@clemson.edu
(803)-306-9095
3164 S. Legacy Park Blvd
Indian Land, SC 29707
linkedin.com/in/zacharykaim

EDUCATION

Clemson University Clemson, SC
• Clemson University Honors College August 2020 - Current
• Bachelor of Science in Management May 2024 Graduation
• Bachelor of Science in Financial Management, Minor in Accounting
• 3.74/4.00 GPA

EXPERIENCE

Publix SuperMarkets - Real Estate Strategy Intern Lakeland, FL
• Coordinated end-of-summer presentation to a large group of Publix leaders. May - August 2022
• Learned about the varying aspects that contribute to Real Estate Strategy for major corporations.
• Received guidance from corporate executives through challenging projects.

Publix SuperMarkets - Grocery Replenishment Specialist Indian Land, SC / Clemson, SC
• Educate new associates in 5 different positions to satisfactory levels. May 2017 - Current
• Guide groups of up to 8 coworkers in completing various tasks including inventory maintenance.
• Helped operate a \$500,000 per week department during times of increased need such as Covid-19.

INVOLVEMENT

Beta Alpha Psi Annual Meeting Las Vegas, NV
• Attended and actively participated in workshops, networking sessions, and presentations. August 2023
• Networked with professionals working in the Accounting, Finance and Information Systems industries.
• Represented Clemson University, showing dedication to continuous learning, leadership and involvement.

United Way of Lancaster County Lancaster, SC
• Volunteered over 100 hours towards various groups under United Way. May 2017 - January 2021
• Coordinated fundraising campaigns with the objective of recruiting people to pledge a weekly donation.

Clemson Undergraduate Real Estate Club, Treasurer May 2023 - May 2024

Beta Alpha Psi - Zeta Rho, Reporting Secretary May 2023 - May 2024

Phi Sigma Pi - Beta Kappa, Finance Chair May 2023 - May 2024

CERTIFICATIONS

Eastdil Secured Virtual Real Estate Finance Training Program July 2023

Project Destined E-Learning Certificate May 2023

Project Destined Global Real Estate Academy Certificate June 2023

STORE Capital Virtual Externship June 2023

AWARDS AND ACHIEVEMENTS

Clemson University Dean's List Clemson, SC
• Achieved above a 3.5 GPA to be recognized by the Dean. Fall 2020, Spring, Fall 2022

Clemson University President's List Clemson, SC
• Achieved a perfect 4.0 GPA to be recognized by the Clemson University President. Spring, Fall 2021

Colby Kainz

ckainz@g.clemson.edu | 407-310-2921

LinkedIn: <https://linkedin.com/in/colby-kainz>

Current Address: 110 N College St. #8 Clemson, SC 29631

EDUCATION

Clemson University, Wilbur O. and Anne Powers College of Business

Bachelor of Science in Financial Management

Minor: Accounting

Emphasis: Corporate Finance

GPA: 3.74/4.00

Clemson, SC

May 2024

PROFESSIONAL EXPERIENCE

Bank of America

Global Operations Summer Analyst

Charlotte, NC
June 2023 – August 2023

- Created financial reports using project level data integrated through Microsoft 365
- Improved strategic initiative procedures to be used in on-boarding of new resources
- Performed governance of intake processes to ensure compliance with Enterprise Change Standards
- Created procedures document used for the analysis of portfolio level risk
- Provided additional support to other members of Program Management Team

SESCO Lighting Inc.

Accounting Intern

Orlando, FL
Summer 2022

- Researched and resolved accounts payable discrepancies
- Posted and reconciled commission payments
- Created purchase orders and accounts payable bills using defined purchasing protocols
- Reviewed and coded employee expense reports for multiple locations
- Provided any additional support for the accounting department as needed

Commercial Equity Partners

Property Manager Assistant

Orlando, FL
Summer 2018 – Summer 2022

- Assisted with maintenance of various commercial properties, seasonally

Colby's Landscaping and Lawn Service

Owner / Operator

Orlando, FL
Summer 2012 – Fall 2020

- Founded and developed company over many years
 - Managed between 2 – 8 employees at once
 - Provided consistent lawn services and fulfilled any customer landscape needs
 - Trained new employees and developed necessary skill sets
 - Marketed company services to potential customers
-

HONORS

Clemson University President's List

Fall 2020 – Fall 2021

Clemson University Dean's List

Spring 2022, Spring 2023

CAMPUS & COMMUNITY INVOLVEMENT

Phi Delta Theta Fraternity

Spring 2021 – Present

Wall Street South Investment Club

Fall 2022 – Present

Beta Alpha Psi - International honor society for finance, accounting and IS students

Spring 2023 – Present

Clemson Real Estate Club

Spring 2023 – Present

TECHNICAL SKILLS

Computer: Microsoft Office Specialist, Prezi, and Acumatica (cloud-based ERP system)

Certifications: Scuba Certified; Boater's License; Hunter's Safety Certified; ServSafe Certified

QUINN KATHOL

qkathol@clemson.edu | (484) 343-2095

Devon, PA 19333

EDUCATION

Clemson University - Clemson, SC

05/2024

Bachelor of Science in Financial Management

Minor: Accounting Emphasis: Corporate Finance

Cumulative GPA: 3.69/4.0

SKILLS

- Relationship Building
- Service-Oriented
- Cool Under Pressure
- Team Player
- Organized
- Adaptability in a Fast-Paced Environment
- Microsoft Office

WORK HISTORY

Finance Intern | Meridian Bank - Malvern, PA

06/2023 - 08/2023

- Created record of the bank's payments of invoices for accounting records.
- Created assets in accounting records for prepaid expenses.
- Ran reports on vendors to analyze bank expenses for specific departments.
- Updated vendor's tax records according to information provided on their W9.
- Helped reconcile general ledger accounts as part of end of month procedures.

Server | The Silverspoon Restaurant - Wayne, PA

06/2019 - 08/2022

- Worked with point-of-sale system to place orders, manage bills and handle complimentary items.
- Explained menu items and suggested appropriate options for food allergy concerns.
- Bussed and reset tables to keep dining room and work areas clean.
- Replenished food items, paper products and canned goods to keep pantry well-stocked during busy periods.
- Used time management skills to diminish the stress of busy periods.

VOLUNTEER EXPERIENCE IN HOUSTON AND GUATEMALA

- Rebuilt communities destroyed by natural disasters during the summers of 2018 and 2019.

Aidan Kaz

571-585-3123 | akaz@g.clemson.edu

EDUCATION

CLEMSON UNIVERSITY - *Wilbur O. and Ann Powers College of Business*

Clemson, SC

Bachelor of Science in Financial Management

May 2024

Minor: Accounting, Emphasis: Financial Planning

GPA: 3.58/4.0

WORK EXPERIENCE

NORTHWESTERN MUTUAL

Reston, VA

College Financial Representative

May 2023-Present

- Create my own financial planning practice with 4 clients and \$7,000 of premium
- Dial over 40 prospective clients per day
- Collaborate with experienced financial advisors to create complex financial plans
- Currently hold my life and health insurance license in Virginia, Washington D.C, South Carolina, and Hawaii

GREAT AMERICAN RESTAURANTS

Sterling, VA

Hospitality Leader, Server, Food Runner

May 2022-August 2022 | May 2023-August 2023

- Lead a team of 28 servers and food runners to handle a dining room full of 400 guests.
- Coach, lead, and train 10 new employees every summer.
- Service six tables at once and provide outstanding guest satisfaction.

MELLOW MUSHROOM

Clemson, SC

Kitchen Staff

January 2022-Present

- Operate Hoagie, Expo, Pizza, and Salad Stations
- Work with a team of 10 to output over 800 meals a day
- Coach and train incoming new employees

LEADERSHIP AND ACTIVITIES

THE INTERNATIONAL FRATERNITY OF THETA CHI

Clemson, SC

Historian

Fall 2020-Present

- Serve on the Executive Board
- Participate in brotherhood events as the Fraternity photographer
- Manage a budget of \$2,500

CLEMSON UNIVERSITY STUDENT GOVERNMENT

Clemson, SC

Student Senator, Vice-Chair HHS

March 2023-Present

- Collaborate with 60 other senators to produce beneficial legislation for 20,000 Clemson students
- Lead the Health and Human Services Committee of 10 individuals to produce a healthier campus
- Manage multiple on-campus projects that support the mental and physical health of Clemson students

Cameron Kearns

221 Walnut Ave, Wayne, PA 19087

cjkearn@clemson.edu

610.639.7796

OBJECTIVES

Results-oriented student pursuing a bachelor's degree in Financial Management with minor in accounting, seeking a position at an investment firm to provide strong analytical, problem-solving, and leadership skills to the company, its investors, and its customer.

EDUCATION

Clemson University – Wilbur O. and Ann Powers College of Business

Clemson, SC

Bachelor of Science in Financial Management

Class of 2024

- Minor in Accounting
- Emphasis: Corporate Finance
- Extracurriculars: Finance Club, Real Estate Club

WORK EXPERIENCE

Vanguard Headquarters

Malvern, PA

Compensation Analyst Intern

May 2023 – Aug 2023

- Gained experience in day-to-day business affairs
- Collaborated and shadowed high ranking individuals
- Worked on various projects that required analytically budgeting and modeling in Excel
- Rotated through different projects for the Wealth Management Group, Institutional Investor Group, Information Technology Group, and Financial Advisor Services Group
- Provided analytical data and visuals to assist in domestic and international decision making to enhance employee compensation and benefits, and provide exceptional service to investors
- Interviewed and coached by the firm's worldwide decision-makers

333 Belrose Bar and Grill

Radnor, PA

Server

May 2017 – May 2023

- Facilitated collaboration between the kitchen and wait staff.
- Developed strong customer service skills for interacting with restaurant guests.
- Maintained composure in a fast-paced work environment.

LEADERSHIP

Clemson University Phi Delta Theta SC Gamma

Clemson, SC

Social and New Member Education Committees

Dec 2021 – Jan 2023

- Was a member of the Social Committee consisting of 10 people with the goal of raising funding for, organizing, and promoting events to develop relationships with other Greek fraternities and sororities.
- Assisted in the management of a budget of \$20k and negotiated with other social chairs to raise an additional \$50k+ for events.
- Was a member of the New Member Education Committee, helping enforce tradition and proper discipline

Wayne Music Festival

- Planned and organized annual music festival for 3 years
- Music festival raised money for Music is Love Foundation
- Developed leadership skills from managing staff and volunteers

ADDITIONAL INFORMATION

Skills: Reliable, Quick Learner, Leader, Motivated, Hard Working

Technical: Proficient in Microsoft Excel, PowerPoint, and the Bloomberg Terminal.

Matthew D. Kennedy

Mdkenne@g.clemson.edu | (201) 565-5516 | 8110 Jacobs Rd, Apt 204, Seneca, SC 29678

EDUCATION

Clemson University, Clemson College of Business | Clemson, SC

Dec 2023

Bachelor of Science in Financial Management, Minor in Accounting, Real Estate Emphasis

GPA: 3.25/4.0

Ridge High School | Basking Ridge, NJ

- Graduated with a 3.6 GPA, ACT: 30, National Honor Society Member (2018-2019)

WORK EXPERIENCE

Meritage Homes | Greenville, SC

May 2023 – August 2023

Land Development Intern

- Managed communication and bidding processes with vendors and strategically optimized costs, enhancing project profitability
- Visited and led maintenance contractor oversight for subdivisions, ensuring adherence to timelines and quality benchmarks. Collaborated with colleagues to supervise homebuilding contractors, maintaining project quality and progress
- Presented Capstone project to senior executives, highlighting expertise in real estate development. Calculated raw land development costs, housing pricing, and market demand to support the viability of neighborhood construction

Tiger Town Movers | Clemson, SC

July 2022 – Present

Co-Founder

- Directing day-to-day operations encompassing client interactions, worker coordination, and ensuring the success of moving jobs while optimizing operational efficiency
- Management of finances, overseeing expenses, worker payments, and marketing budgets
- Coordinating marketing initiatives, including cold-calling and online management, resulting in 100+ serviced clients

pxRobos NFT

December 2021 – August 2022

Project Lead

- Planned and executed a successful launch of an NFT (non-fungible token) project on the Ethereum blockchain
- Led a Web 3.0 project team of 10 individuals comprised of developers, administrators and analysts
- Participated in setting strategic direction, which included designing a token that gives holders voting and governance rights

Robert Bosch | Anderson, SC

August 2021 – December 2021

Logistics Co-op

- Communicated with different suppliers globally to coordinate shipment expedites from our manufacturing centers
- Produced reports and maintained a database to track material and available supplies to improve management transparency
- Tracked delivery status and truck routes to ensure material is delivered efficiently, ensuring on-time deliveries 90% of the time

LEADERSHIP & EXTRACURRICULAR

Delta Chi Fraternity Recruitment Chair | Clemson, SC

November 2021 – November 2022

- Preparation of Fall and Spring Formal Recruitment Process
- Coordination of several events to promote recruitment and maximize chapter opportunities
- Enhanced a range of leadership skills such as delegation, time management, and networking

Community for Undergraduate Business Students Program (CUBS) | Clemson, SC

September 2019 – May 2021

- Participated in the CUBS program, a living-learning community for business students
- Engaged in social events, workshops, core classes, tours, and community service throughout Freshman year

South Carolina Botanical Gardens | Clemson, SC

September 2019 – October 2019

Volunteer

- Coordinated effectively with volunteers and maintenance workers to complete whatever task necessary to expand the gardens
- Engaged in digging up gravel, rocks, and unwanted material to establish useable greenhouses

Ridge High School | Basking Ridge, NJ

September 2015 – June 2017

200+ Hours Community Service Silver Award Recipient

- Volunteered at Mount Prospect Elementary School to assist in the coordination of students in recreational and educational activities
- Collaborated with aid counselors with any task necessary to ensure the safety and happiness of elementary students

Technical Skills Microsoft Office/Excel ■ Co-Star Certified ■ Entrepreneurship ■ Leadership

Keith Kerber

Pittsburgh, PA | kkerber15@gmail.com | 412-525-1308

EDUCATION

Clemson University | Wilbur O. and Ann Powers College of Business

Clemson, SC

Bachelor of Science in Financial Management

May 2024

Emphasis in Financial Planning | Accounting Minor | GPA: 3.4/4.0

WORK EXPERIENCE

Baird Private Wealth Management

Pittsburgh, PA

Private Wealth Management Intern

June-August 2023

- Worked closely with an advisory team that included stock analysis, review planning, and record keeping
- Attend weekly meetings about the financial industry, business sectors, and the RW Baird Company
- Helped construct portfolios that fit to the clients needs and risk tolerance
- Collaborated with high network clients in providing feedback and insight to a team afterwards
- Worked together with a team of fellow interns that analyzes and attempts to improve an aspect of RW Baird

St. Clair Country Club

Pittsburgh, PA

Captain Caddy

April 2017-August 2022

- Captain Level Caddy and Bag Room Attendant
 - Included working very closely with the clients and tailoring to their needs

Upper St. Clair Athletic Association

Pittsburgh, PA

Director of Referees

October 2018-March 2020

- Organize, schedule, and pay referees for 50 youth games each week

LEADERSHIP EXPERIENCE & ACTIVITIES

Pi Kappa Alpha

Clemson, SC

Member

April 2021-May 2024

- Brotherhood Chairman - Organize and run events for 150 members
- Recruitment Chairman – Working with a small team to manage a plan and budget to recruit potential new members from a pool of over 500 people
- Athletics Chairman – Select, manage, and communicate with league managers for intramural sports

Wall Street South Investment Club

Clemson, SC

Member

January 2023-Present

- Gained a hands-on experience in trading securities and managing an investment portfolio through the use of a comprehensive trading simulation featuring stocks, bonds, mutual funds, options, futures, and international equities

SKILLS & INTERESTS

Computer Skills: Tableau, Morningstar, MoneyGuidePro, ValueOne, Microsoft Office

Skills: I have hands on business experience with exposure to financial advisory. Strong interpersonal skills with event planning and budgeting

Interests: Personal Investments, Working Out, Podcasts, Golf, Avid Sports Fan

Jamie Benjamin Koches

jkoches@clemson.edu ♦ www.linkedin.com/in/jamie-koches

Education

Clemson University, *College of Business*
Bachelor of Science in Financial Management, Corporate Finance Emphasis
Minor in Accounting
GPA: 3.64 / 4.00

May 2024

University of New Haven CEA CAPA
CEA CAPA Study Abroad Program: Barcelona, Spain

January 2023 - April 2023

Work Experience

Macquarie Group Jacksonville, Florida

Summer Analyst Intern - Commodities & Global Markets Financial Management Group (Projects Team) June - August 2023

- Collaborated with Financial Control, Product Control, and Cash Equities to help complete a total of 8 projects
- Analyzed various forms of financial data, preparing corresponding Pivot Tables for scenario analysis
- Utilized VBA programming language to automate the extraction and cleaning of P&L reports
- Responsible for preparing P&L reports pertaining to all Commodity-Structured Deals, this included the P&L of each Business Unit's Commission, Expenses, Interest, Revenue, and Transfer Pricing

Enso Co-Living Barcelona, Spain

Finance & Sales Intern January - May 2023

- Collaborated directly with the CEO & CFO to assist in M&A Analysis, specifically the preparation of Pro-Forma statements
- Utilized the Income Approach and Gross Rent Multiplier Approach to value potential investments in the Barcelona area
- Responsible for acquiring relevant data on the Co-Living market in Spain through independent research and cold calls
- Surveyed 32 apartments in Barcelona that met Enso's investment goals, recording all data in the CRM
- Assisted the sales team by responding to clients via phone and email, as well as in-person service at the office

Wild Dunes Resort - Destination by Hyatt Charleston, South Carolina

Food and Beverage Server May - August 2021 & 2022

- Utilized interpersonal skills to communicate and help customers with whatever they need
- Provided over 100 customers on a daily basis with a positive, memorable quality of service that is both efficient and precise.
- Extremely fast paced server position that required consistent preparation, improvising, and troubleshooting to execute a systematic approach to the job

Activities, Awards, and Interests

Activities:

- **Clemson University Investment Research Club** 2022-2023
- Identify undervalued and overvalued securities in the Equities Market
- **Clemson University Real Estate Club** 2022-2023
- Bi-weekly discussions and monthly networking events
- **Clemson Skydiving Club** August 2023 - Present
- Weekly on-site instruction followed by individual jumps
- **Gateway to World Markets : New York City** May 2023
- Participated in interactive discussions with Clemson Alumni in finance, marketing, and sales
- Notable companies included Amazon, Cisco, Goldman Sachs, Jefferies Investments, J.P. Morgan Chase, Madison Square Gardens, New York Stock Exchange, and PepsiCo

Awards:

- Clemson University President's List Fall 2022

Interests:

- Financial Markets, Golf, Information Technology, Physical Exercise, Skydiving, Soccer, Surfing

Arhum Kouser

Greer, SC | (864) 245-7249 | arhumk@clermson.edu | www.linkedin.com/in/arhum-kouser

EDUCATION

Clemson University

May 2024

Bachelor of Science in Financial Management

- o Minors in Management Information Systems and Accounting
- o Concentration in Corporate Finance
- o **Cumulative GPA: 3.73/4.00** |
- o **Relevant coursework:** Investment Analysis, Managerial Accounting, Cost Accounting, and Real Estate Finance

RELEVANT EXPERIENCE

Texas Capital Bank

Dallas, TX

Corporate Analyst Internship- Healthcare

2023- 2023

- o Supported due diligence and underwriting on two Healthcare deals by analyzing financial statements and modeling potential revenue.
- o Conducted quantitative and qualitative research on multiple companies to assess fair value, risk, and capital of the Healthcare portfolio.
- o Developed and maintained differentiated databases, spreadsheets, and financial models that assessed the Healthcare portfolio.

Dow Chemical

Midland, MI

Commercial Development Intern

2022- 2022

- o Spearheaded an initiative for the Dow Polyurethane business sector relating to competitor research, volume, equity, and operational efficiencies on washable pillows.
- o Consulted with companies such as Tempur-Pedic, Serta, and Sinomax.
- o Presented various analytical tools to the company that contributed directly to the growth of the Polyurethane business.
- o Constructed a business model to give the Polyurethane business sector an increase of \$3 million throughout the next few quarters.

Clemson University Creative Inquiry- Entrepreneurship and Start-Ups

Clemson, SC

Undergraduate Researcher with Spiro Institute

2021-2022

- o Worked on various projects relating to start-ups and entrepreneurship to further undergraduate research within that area.
- o Collected and analyzed data on different start-ups around the state to gain knowledge on implementation strategies.
- o Derived techniques for new start-ups within Clemson University to increase student opportunities on campus.

LEADERSHIP AND ACTIVITIES

Pi Alpha Phi Fraternity, Inc.

Clemson, SC

Vice President of Finance

January 2022- May 2022

- o Coordinated fundraising and philanthropy events that benefited our leading philanthropic organization.
- o Facilitated a fundraiser at a university-organized event by preparing and selling cultural food items, which brought \$500 to the organization's funds.
- o Verified the adoption of a highway near Clemson's campus for the organization to support and clean monthly.

Vice President of External Operations

August 2022- Present

- o Strategically facilitated transformation of marketing strategies and guidelines by implementing new criteria.
- o Recruited 15+ new members through pointed, streamlined events and implemented weekly programming meetings.
- o Provided workshops with over 3 external organizations to help hone internal and external organizational skills.

Clemson Honors Student Ambassador

Clemson, SC

First-Level Ambassador

May 2022-Present

- o Led orientation groups of 20+ people that helped to facilitate new student introductions onto campus.
- o Coordinated university events and activities to promote alumni relations.
- o Maintained communication with students and families and offering assistance to those unfamiliar with the campus and area.

Indian Cultural Association

Clemson, SC

Secretary

May 2021-May 2022

- o Facilitated communication between the executive board and 80+ members of the organization.
- o Managed the workflow of executive board members to ensure the adherence to the policies set forth to succeed,
- o Introduced a time management system that improved the efficiency of our weekly meetings,

LANGUAGE AND TECHNICAL SKILLS

- **Languages:** English (native), Urdu (fluent)
- **Computer:** Proficient in Microsoft Excel (VLOOKUP, IF statements, Data Validation), Proficient in Tableau, Proficient in JMP
- **Certificates & Achievements:** Palmetto Fellows Scholarship, Dean's List, President's List, Wall Street Prep Certification in Accounting and Powerpoint

Camden Krautsack

80 Mark Drive | Hawthorn Woods, IL 60047 | (224) 256-7488 | ckrauts@g.clemson.edu

EDUCATION

Clemson University, College of Business
Bachelor of Science in Financial Management
Minor: Accounting, Emphasis: Corporate Finance
Dean's List Fall 2021

Clemson, SC
Graduates May 2024
Cumulative GPA 3.08/4.00

WORK EXPERIENCE

EMC Capital Advisors
Hedge Fund Intern

Bannockburn, IL
Summer 2023

- Assisted in managing a portfolio of nearly \$1 billion in assets for institutional and high net worth clients.
- Studied the firm's research process utilizing AI and machine learning to optimize systematic trading strategies and gained proficiency in understanding risk management protocols.
- Responsible for trade and position reconciliations, ensuring accuracy and consistency across client accounts.
- Managed currency account conversions to optimize international client investment positions.

Little Joey's Pizza
Various Roles (Seasonal)

Hawthorn Woods, IL
November 2019 – July 2023

- Demonstrated strong work ethic and adaptability by fulfilling roles such as cashier, catering delivery, and cook.
- Developed exceptional customer service and communication skills, maintained order efficiency and accuracy, and exhibited teamwork and time management in a fast-paced environment.

LEADERSHIP EXPERIENCE

Delta Chi Fraternity
Risk Management Officer

Clemson, SC
December 2022 - Present

- Oversaw and gave guidance on all chapter activities to ensure members' safety and well-being while following and conforming to all chapter and university risk management policies.

ACTIVITIES AND INTERESTS

Wall Street South Investment Club Member

August 2023 - Present

- Managed and traded a simulated portfolio consisting of \$100,000 with the use of stocks, bonds, mutual funds, and futures.

Delta Chi Fraternity Member

September 2021 – Present

- Participated in philanthropy and service initiatives such as fundraising for The Jimmy V Foundation and volunteering at a pet shelter.

Finance Club Member

August 2023 - Present

Skills: Microsoft Excel, Tableau, Portfolio Analysis, Communication, Teamwork, Risk Management
Interests: Golf, Recreational sports, Outdoor activities

Patrick Philipp Krejs Jr.

pkrejs@g.clemson.edu | (214) 505-1125 | <https://www.linkedin.com/in/patrick-krejs-01a528231/>

EDUCATION

Clemson University

Clemson, SC

Bachelor of Science in Financial Management

May 2024

Minor: Accounting, Emphasis: Banking and Investments

Relevant Class Projects:

- Financial Management II – Capital Structure Optimization Project
 - Through analysis of a company's financials made a recommendation to that company on what steps could be taken to improve their capital structure
- Investment Analysis – Risk/Return Efficient Frontier Project
 - Given a bond fund and a stock fund computed the return and standard deviation for incremental portfolios (based on varying the weights between the two funds), calculated the minimum variance portfolios for each correlation, created investment opportunity sets, and identified the efficient frontier

WORK EXPERIENCE

BP Energy Partners

Dallas, TX

Summer Intern

May 2023–July 2023

- Worked closely with the investment associates and other members of the investment team by conducting research and assisted in due diligence on potential investment opportunities
- Assisted in the creation and improvement of internal and external presentations
- Maintained BP's database of deals and comp data by leveraging Pitchbook
- Supported a Principal of the investment team developing sourcing channels for new opportunities

SELECT DEAL EXPERIENCE

- **Project Ready – Aftermarket Compressor Reseller and Repair Shop (\$50mm)**
 - Collaborated with the deal team on projects and analyses through the marketing and initial diligence phases
 - Assisted investment associate in drafting the buyout model, supported him on a monthly basis rolling forward the model with actuals
 - Supported the team with research project on compressor maintenance cycles including a trip to Ready's office and meeting with management
 - Presented findings to the investment committee and coordinated follow-ups

Northwood Country Club

Dallas, TX

Laborer Golf Course Maintenance and Landscaping

May 2022–August 2022

- Monitored weekly and daily scheduled tasks to achieve desired workflow speed
- Liaised with internal departments to optimize productivity and efficiency
- Developed lasting customer relationships and grew network over time
- Utilized general problem-solving techniques and critical thinking to complete complex projects
- Consistently exceeded set daily goals and was able to assist others in their tasks

VOLUNTEER & CHARITY WORK

Helping Hands of Clemson

Clemson, SC

Part Time Volunteer

March 2021–Present

- Managing donations at the Helping Hands Thrift Store to ensure that funds were raised for the foster home
- Helping Hands Thrift Store inventory maintenance and organization
- Guiding customers throughout thrift store for customer assistance and satisfaction
- Participation in marketing and media to raise awareness about the charity

SKILLS, ACTIVITIES, & INTERESTS

Technical Expertise: Salesforce (Altvia), Pitchbook, Excel, PowerPoint, Word

Skills: Company due diligence, market research, investment analysis, teamwork/collaboration, and financial/accounting statements

Activities & Societies: Clemson Financial Planning and Management Association, Clemson Real Estate Club, CU Fly Fishing Club

Interests: travel, outdoors (fishing, skiing, land management), sports (hockey, soccer, football), music (60's–90's)

Joe Lam

www.linkedin.com/in/joe-lam13

(843) 532-0634

Lam6@clemson.edu

EDUCATION

Clemson University, College of Business
Bachelor of Science in Financial Management
Minor: Accounting, Emphasis: Corporate Finance
Dean's List

Clemson, SC
May 2024
GPA: 3.40/4.00
December 2020-May 2023

WORK EXPERIENCE & VOLUNTEER

FIRST CITIZENS BANK

Summerville, SC

Junior Intern/Seasonal Sales and Service Representative

May 2023-August 2023

- Responded to customer needs by providing financial services to roughly 350 customers daily.
- Collaborated with bankers, vendors, and investor services to achieve the branch's sales goal.
- Processed the opening of debit/credit card, checking, and savings accounts to assist bankers.
- Arranged accurate, high volume currency using money counters and manual.

H&L Supermarket

North Charleston, SC

Cashier

May 2022-July 2022

- Responded to customer needs by providing product location, back stock inventory analysis, and product substitution for roughly 470 customers daily.
- Established social interaction with customers to resolved problems with customers' produce and enabled swift transactions.
- Arranged the impulse goods shelves to incentivize purchases and increase revenue.

Wasabi

Summerville, SC

Hibachi Waiter

April 2021-July 2021

- Flourished in high volume, fast paced environment while welcoming 240 customers daily.
- Attended to customers' needs and established the ability to cross sell.
- Ensured cleanliness in the dining room and kitchen for the benefit of the customers and staff members.
- Multitasking side jobs including napkin folding and table cleaning while remaining courteous and attentive to patrons.

H&L Supermarket

North Charleston, SC

Volunteer Stocker

June 2019-August 2019

- Cross referenced with the manifest to ensure proper shipment was delivered.
- Unloaded trucks, stocked shelves, and arranged products to be attractive and enticing for customers while facilitating a smooth transaction experience by ensuring proper price labels.
- Provided customer service on the floor to increase customer satisfaction and develop customer interactions with roughly 15 customers daily.
- Ask customers probing questions to establish potential production promotion and cross selling.

SOFTWARE EXPERIENCE

- Bloomberg Terminal
- JMP
- Microsoft Excel
- Microsoft Power BI
- Microsoft Word
- Tableau

Dalton Lawler

864-906-9686
daltonl@clemson.edu

14 Shannon Ridge Court
Greenville, SC 29615

EDUCATION

Clemson University
Bachelor of Science in Financial Management
Minor in Accounting
Emphasis in Financial Planning.

Clemson, SC
May, 2024

Bloomberg Market Concepts (BMC)
BMC certified

October 2022

WORK EXPERIENCE

School Projects

- Analyzed stocks in the biotech industry based on several characteristic and presented the best small and mid-cap investable companies.
- Created and managed a simulated portfolio over the course of a semester and presented the results as well as the decisions made

Rick Erwin's Eastside

Greenville, SC

Expeditior, Food runner, Server assistant

- As Expeditior I worked with the kitchen and floor staff to direct the food to each customer and oversaw making sure no mistakes were made during that process.
- As Food runner I made sure each dish was delivered to the right table and the right customer at each table.
- As Server assistant I tended to the needs of the customers as well as cleaning and clearing tables after each course and party.

Greenville County Schools

Greenville, SC

- Grounds Department – I worked 10 hours a day fixing irrigation for the Greenville County school district during the summer of 2022 and 2023.

EXTRACURRICULAR ACTIVITIES

Finance Club

- I am a member of the Finance Club as of 2022

4-H Youth Shotgun Team

- One More Shot- Clemson 4-H, 2019, 2020
- Secretary – wrote and organized team records and meeting notes.

Clemson University Shotgun Team

- Clemson Shotgun Team competitive shooting 2021-Present

Motocross Racing

- AMA series racer 2011- 2021
- Loretta Lynn southeast qualifier top five.
- Loretta Lynn southeast regional top twenty.
- Trained and raced competitively throughout middle and high school.

Classic Car Restoration

- I have been slowly restoring a 1980 corvette for the past few years in my free time.

PASSIONS

Motocross, Finance, Skiing, Snowmobiling

DERRICK X. LEGAULT

dxlegault34@gmail.com | (513) 500-7929

15025 Beacon Ridge Drive, Seneca, SC 29678 | 6684 Caddies Way, Mason, OH 45040

EDUCATION

Clemson University *Clemson, SC*

May 2024

- Clemson University Honors College
 - College of Business - Candidate for Bachelor of Science degree in Financial Management; Minor in Accounting
 - GPA: 3.90; President's List (2020, 2021); Dean's List (2022); Academic Scholarship – 4 years
 - Wall Street South Investment Club; Clemson Blockchain Club; Clemson Central Spirit
 - Peer Tutor – Finance, Accounting, Calculus
-

WORK EXPERIENCE

GE Vernova: Financial Management Program Intern – FP&A *Atlanta, GA*

Summer 2023

- Led analysis of \$150M+ Gas Power facility expenditures to identify reporting inconsistencies and inaccuracies between finance and operations systems resulting in greater fixed production cost visibility. Worked with cross-functional leadership to determine root cause of discrepancies. Presented finding to senior leadership and analysis is being implemented as a key part of cost standardization initiatives.
- Identified \$29M in improperly categorized real estate lease contracts as part of detailed audit of lease expenses recorded in an array of financial systems. Recommended changes in accounting structure and documentation procedures resulting in enhanced compliance with current GAAP standards.
- Selected to lead intern team on a comprehensive assessment of quarterly financial results across Gas Power business units. Received positive feedback on analysis from executive team.

GE Gas Power: Financial Management Program Intern – Supply Chain Finance *Greenville, SC*

Summer 2022

- Identified \$1M of incorrectly classified expenses through leadership of contract labor expenditures audit. Designed an improved tracking model for outside labor costs through streamlining processes and automation of data input, resulting in reduced errors and improved budget forecast accuracy.
- Led analysis of labor resource allocation resulting in \$750,000 annual cost savings opportunity. Used results to lead creation of a process for tracking applied direct labor hours.
- Created physical inventory plan execution for 1.5M square foot plant. Collaborated across multiple functions and management levels to ensure incorporation of all business team objectives.

Ajinomoto Cambrooke: Logistics Intern *Ayer, MA*

Summer 2021

- Negotiated improvements in deferred payment terms with 10+ different suppliers during cost savings initiative gaining an average additional 11 days on repayment terms.
- Compiled data for labor analysis and updated cost of goods within inventory system resulting in improved accuracy for COGS per SKU and highlighting specific needs for future COGS reduction initiatives.

Target: General Merchandise Associate *West Chester, OH*

2019 - 2021

- Supervised flow of inventory and customer experience satisfaction initiatives in five different departments.

Claritas Global Marketing: Sales and Business Development Intern *Cincinnati, OH*

Summer 2019

- Identified new target audience opportunities by completing data segmentation analysis of Banking and Higher Education industries. Presented results to senior leadership; analysis was key part of 10 new client proposals.
 - Analyzed internal expense system and created process improvements resulting in \$10,000 cost savings.
-

COMMUNITY LEADERSHIP

Clemson Wall Street South Investment Club: Member

- Finished in top 10% of stock portfolio investment competition; led management of 15 stock portfolio during volatile market environment.
- Created student network to collaborate on researching news and trends in cryptocurrency and stock markets.

Clemson Peer Tutor: Finance, Calculus, Accounting

- Selected by professors for demonstrated classroom leadership, subject knowledge, and communication strength.

Leukemia & Lymphoma Society - Color 4 a Cure 5K Fundraiser: Consultant

- Raised over \$20,000 in donations as fundraising chair and 5K Run Event leader – 2020; largest amount raised
-

ADDITIONAL INFORMATION

Proficient in Microsoft Suites, Oracle, Adobe and CAD; Class 2 licensed soccer referee; Spartan extreme race competitor. Enjoy tracking and investing in stock market/cryptocurrencies, running, and Jiu-Jitsu.

OLIVIA LEONARD

201-725-0573 | 720 Hudson Street, Hoboken, NJ 07030 | livleonard29@gmail.com

EDUCATION

Clemson University Wilbur O. and Ann Powers College of Business
Bachelor of Science in Financial Management; Real Estate Emphasis
GPA: 3.7/4.0

Clemson, SC
May 2024

University of Wisconsin Wisconsin School of Business
Majors: Finance and Real Estate
GPA: 3.58/4.0

Madison, WI
September 2020 – May 2021

WORK EXPERIENCE

Urby Acquisition and Investments Intern

Hoboken, NJ
Summer 2023

- Conducted market research with consideration to acquisition criteria and firm priorities
- Helped compile the multifamily valuations deck and summary of assumptions
- Prepared scope of work matrices for all construction and maintenance contracts
- Headed expansion of short-term rental units in NJ and TX

Newmark Debt, Equity & Structured Finance Team, Capital Markets Intern

New York, NY
Summer 2022

- Prepared cash flow modeling and analysis using Argus and Excel
- Conducted market research and competitive analysis using CoStar and Real Capital Analytics
- Drafted offering memorandums and press releases for active industrial, multifamily and hotel deals
- Discovered and presented alternative asset class opportunity to senior management
- Winner of Summer Intern Presentation as part of four-person team to NYC Newmark executives

The Shepherd Hotel Cocktail Server

Clemson, SC
Fall 2022

- Helped to launch new downtown Clemson boutique hotel's bar and beverage service
- Provided excellent customer service in high demand environment

ConRock Construction Intern

Hoboken, NJ
Winter 2022

- Modeled cash flows and organized data for construction projects in Excel

Alfalpa Front of House Staff

Hoboken, NJ
Summer 2021

- Operated POS system, coordinated orders and deliveries for fast-paced eatery
- Supported company mission by promoting health, joy, and balance through food

NJ Division of Developmental Disabilities Direct Support Professional

Hoboken, NJ
Winter 2020

- Worked with an individual with developmental disabilities on life skills

Investor 21 LLC Assistant to Real Estate Developer

Fort Lee, NJ
Summer 2019

- Supported daily operations including social media management

CLUBS & COMMUNITY INVOLVEMENT

Women in Business Fundraising Chair

Clemson, SC
Clemson, SC

Kappa Kappa Gamma Epsilon Mu Chapter

Habitat for Humanity

Clemson, SC & Paterson, NJ

SKILLS

Argus Enterprise

Proficient in Microsoft Excel, Powerpoint, and Word

Bennett Link

6210 Graftons View Ct • Elkridge, MD 21075 • blink@g.clemson.edu • 410-844-2359

Education

Clemson University, College of Business

Clemson, SC

Bachelor of Science in Financial Management

December 2023

- Minor: Accounting, Emphasis: Banking and Investments
- Cumulative GPA: 3.36/4.0

American University of Rome

Rome, IT

Clemson Study Abroad Program

June-July 2022

Work Experience

Bay Point Wealth

Annapolis, MD

Wealth Management Intern

June 2021-Present

- Working closely with the associates and financial advisors in developing, structuring, and analyzing client portfolios.
- Aiding in monitoring, assessing, and altering asset allocations and then presenting them to the advisors and clients upon completion.
- Developing and implementing various investment and tax strategies using several different forms of planning software.
- Partaking in weekly meetings pertaining to bolstering the client experience and smoothing the financial planning process, along with day-to-day client meetings.

Trinity School

Ilchester, MD

Head Counselor

July-August 2022

- Supervised groups of 20 participants while planning and implementing weekly activities.
- Created detailed schedules and assisted teaching new counselors.
- Communicated with guardians and peers on programmatic outcomes

Guinness Open Gate Brewery

Baltimore, MD

Busser

June-August 2021

- Provided timely and satisfying table service to guests in a very fast-paced environment.
- Assisted servers, bartenders, and barbacks to ensure a positive guest experience.

Professional Memberships

The National Society of Collegiate Scholars, Scholar

August 2021-Present

Wall Street South Investment Club, Member

August 2022-Present

Finance Club, Member

August 2022-Present

Skills

- Microsoft Office (Excel, Word, PowerPoint)
- Adobe Software Suite
- JMP Data Analysis
- Financial Statement Comprehension

ANGELO LOMBARDO

157 Trickle Drive, Summerville, SC 29483 | angelol@clemson.edu | C: 631-974-1830

EDUCATION

Clemson University: Wilbur O. and Ann Powers College of Business
Bachelor of Science in Financial Management
Minor in Accounting | Emphasis in Commercial Banking and Investments

Clemson, SC
May 2024

WORK EXPERIENCE

Research Analyst, East Coast Options Services, New York, NY May 2022 – August 2022

- Obtained quotes on the sugar, coffee, & cocoa markets
- Maintained relations with clients as a representative for the company
- Analyzed live commodities option trading on the NYBOT and provided financial analysis to support decisions
- Extracted market information from large data sets using VLOOKUP and pivot tables in Excel

Student Financial Manager, Clemson University – Dept. of Reservation & Events, Clemson, SC. April 2023 – Present

- Create, develop, & analyze over 100 reports, spreadsheets, & graphs for internal and external use that are used to improve efficiency & track performance
- Lead and oversee a team of 5 people through various projects across a range of disciplines
- Coordinate with other manager to craft and deliver the agenda to drive the focus of staff meetings to over 50 employees
- Oversee interviewing & recruiting processes for both student and full-time employees departmentwide

Student HR, Accounting & Invoicing Manager, Clemson University March 2023 – Present

- Perform weekly reconciliations across the department & different methods of payments
- Manage internal conflict resolution & providing an equal & safe workplace for all employees
- Review the systematic transition of interdepartmental & external transactions
- Created a proprietary system to yield faster results for fund flows across university departments
- Interact with over 100 clients on the behalf of the Clemson University: including ESPN, university departments and student organizations in relations to financial matters such as payment, discounts & pricing packages

Partner, On The GO!, Remote February 2023 – Present

- Aid in financial & marketing decision making for the company
- Use code to help develop the company's application

Head of Marketing & Client Relations, N&A Green Solutions, Hauppauge, NY March 2020 – August 2021

- Built a social media presence to market to and engage customers, which resulted in about 5 more customers a month
- Promoted and used sales tactics to increase company sales by 43%
- Created over 100 pamphlets for customers with pandemic information & how our product protects against Covid-19

LEADERSHIP EXPERIENCE

MKT 4950 – World Markets: New York Summer 2023

- Enrolled in a class of 20 students that went to New York City to meet with Financial and Marketing experts in their respective industry over the summer of 2023. In which we met with CFOs of large corporations & leaders in the finance community across 15 companies including – JPMorgan Chase, Goldman Sachs, The NYSE & Amazon

Children's Heart Foundation: Heart Run 2016 - Present

- Organized & lead a team of 15 people to alternate running on a treadmill in a competition format. All proceeds, raffles, & miles ran contribute to the Children's Heart Foundation. Given multiple speeches during the event & help organize and arrange gyms to host the event

SKILLS, INTERESTS & ACTIVITIES

Computer: Bloomberg; Tableau; SQL; SAS; Excel; Power BI; PowerPoint; Word; Hootsuite Certification

Interests: Professional Sports; Exercise; Fantasy Football; Movies

Activities: *Wall Street South Investment Club* – Member - Mock stock trading by managing a portfolio of over 20 stocks and ETFs, host both alumni and investors, and make research-based investment decisions in a collaborative manner; pitched a new stock every month by analyzing industry performance & market trends by utilizing Bloomberg.

Real Estate Club – Member - Weekly meetings in which members discuss investment opportunities and host various alumni and real estate property investors.

Finance Club – Member – Weekly meetings in which members discuss relevant financial news/topics and host various alumni & guests to speak with members.

Ava Machione

amachio@g.clemson.edu • (864)-762-0356 • linkedin.com/in/ava-machione

EDUCATION

Clemson University - College of Business

Bachelor of Science in Financial Management

Emphasis in Corporate Finance, Minors in Accounting and Dance

May 2024

GPA: 3.33/4.0

WORK EXPERIENCE

Accounting Intern

Summer 2022

Fripp Island Resort

Fripp Island, SC

- Calculated daily deposits from each restaurant on the island, counted cash banks, stamped and filed bills, adjusted and calculated restaurant pricing in Microsoft Excel
- Took inventory, scanned invoices, bank statements, purchase orders, completed transfer sheets
- Communicated with vendors, organized and monitored food and beverage shipments/deliveries, input new employees, calculated net sales, wrote checks, adjusted payroll and daily tips

Student Phonathon Supervisor

Winter 2022 - present

Clemson University Annual Giving Office, Clemson University

Clemson, SC

- Monitor student callers while on phone, organize call lists, take credit card pledges
- Train new callers, print pledge cards, pack and send out pledge card envelopes

Waitress/Bartender

Summer 2021 - Summer 2023

Fripp Island Resort

Fripp Island, SC

- Serve customers at their tables, checked member cards, put orders in, made drinks, count bar banks, open/close outdoor bar, help serve at weddings and other special events

Newspaper Typesetter

Fall 2017 - Spring 2020

Clinton Chronicle

Clinton, SC

- Typed "Letters to the Editor," created ads, wrote receipts, sorted yearly newspapers

HONORS and ACTIVITIES

Xerox Innovation and Information Technology Award

May 2019

Wall Street South Investment Club

Fall 2023 - present

Finance Club

Fall 2023 - present

Distinguished Ethics Scholars Program

Spring 2023 - present

Women in Science and Engineering

Fall 2020 - Spring 2022

Alpha Omega Epsilon Sorority

Fall 2021 - present

CHAARG

Fall 2022 - present

SERVICE and VOLUNTEER EXPERIENCE

Habitat for Humanity

Fall 2019 - present

Salkehatchie Summer Service

Summer 2016 - Summer 2019

Project WARM

Winter 2011 - Winter 2020

Meals on Wheels

Winter 2017 - Winter 2020

TECHNICAL SKILLS

Microsoft Excel – Proficient

Microsoft Office Suite – Proficient

Revit - Proficient

AutoCAD – Basic

MATLAB – Basic

Prezi - Basic

JACKSON R. MAHONEY

Greensboro, GA 30642 • 845.490.8369

jrmahon@clemson.edu

Education/School Activities

Clemson University

Bachelor of Science in Financial Management

Minor in Accounting, Emphasis in Real Estate

Experience: Excel, Visio, Access, and SAP

Certifications: OSHA 10

Clubs: Real Estate Club, Finance Club, Pickleball Club

Clemson, SC

December 2023

GPA 3.4/4.0

Work Experience

Reynolds Lake Oconee

Dockhand

- Fueled, cleaned, drove, and prepared country club members' boats for departure.
- Provided first-class customer service as well as networked with club members.

Greensboro, GA

Summer 2023

Materion Corporation

Supply Chain Management Intern

- Drove physical inventories and collaborated with the Materials/Inventory Supervisor on bottleneck mitigation.
- Worked in procurement on vendor relations and resource estimations.
- Participated in inventory accounting and made reconciliations.
- Created and presented a Supply Chain and Inventory Control presentation for Materion senior management at the Cleveland, Ohio headquarters.
- Actively updated SAP sitewide system to reschedule backlisted orders.

Brewster, NY

Summer 2022

Palmer Hardware Store

Store Associate

- Processed accounts for preferred customers and provided billing information.
- Maintained product inventory and placed orders for replenishment of hardware products.
- Validated daily cash and credit card actions.
- Provided solution recommendations for customer problems with a high level of customer service.
- Independently built and repaired window screens, grills, and wheelbarrows.

Brewster, NY

2016-2022

Leadership Experience

Phi Kappa Tau

Founding Father and Social Chairman

- Coordinated events, trips, and social gatherings between a multitude of chapters, organizations, and venues.
- Oversaw a social budget and delegated a committee of 20 members.

Clemson, SC

2022-2023

Volunteer Experience

Cystic Fibrosis Foundation

- Personally campaigned and raised over \$3,000 in the local Brewster, NY area for cystic fibrosis awareness.
- Performed in a talent/awareness show along with nine other contestants.

St. Lawrence O'Toole Thanksgiving Service

- Prepared and delivered pre-heated meals to underprivileged residents in the Brewster, NY community on Thanksgiving morning. (10 Years)

Brewster CAP Program

- Provided help sorting and boxing food for local families in the Brewster, NY community who need help with food essentials.

NY State Blood Donor Program, The Blood Connection (SC)

- Donations of blood at Brewster High School and Clemson University

Maha Malik

713 Emerald Hill Court Simpsonville SC 29681

Cell: 864-283-9957 | Noor@g.clemson.edu

Dedicated Individual with a strong academic foundation and a passion for analytical problem-solving. Proficient in financial analysis, data interpretation, and risk assessment. Skilled in utilizing financial software and tools to make informed decisions. Excellent communicator and team player, ready to contribute analytical expertise to drive sound financial strategies.

EDUCATION

Clemson University, College of Business

December 2023

Bachelor of Science in Financial Management

Emphasis: Corporate Finance, Minor: Accounting

GPA: 3.34/4.0

WORK & LEADERSHIP EXPERIENCE

iREIT® on Alpha, Brad Thomas

May 2023 – Current

Financial Analyst Intern

- Conduct in-depth research on real estate investment trusts (REITs) and various financial securities.
- Analyze market trends to provide comprehensive investment recommendations for model portfolios.
- Enhanced content quality through active communication and shared insights, strengthening a productive working dynamic.
- Proactively stayed updated on industry shifts, integrating the latest developments to produce relevant and timely content.

PMI Southern States, Simpsonville, SC

October 2021 – August 2022

Account Manager

- Fostered strong client partnerships by understanding their unique needs and aligning company solutions to drive customer satisfaction.
- Developed and executed strategic account plans, resulting in increased revenue and market share for the organization.
- Conducted regular meetings and check-ins with clients to provide updates, gather feedback, and address any concerns, showcasing exceptional communication and problem-solving skills.

Marblehead Community Store, Marblehead, MA

February 2018 – August 2021

Store Manager

- Oversaw day-to-day operations, including inventory management, staff scheduling, and customer service.
- Implemented effective sales strategies that led to a 15% increase in monthly revenue.
- Trained and mentored team members, resulting in improved customer satisfaction and employee performance.

SKILLS & INTERESTS

Certifications & Training: Bloomberg Certification, FactSet Certified, Microsoft Certified, Proficiency in Data Tools (Python, SQL, Power BI, Tableau), Reading and Identifying Data in Charts

Interests: Technology, Stocks, Traveling

Matthew A. Mandel

mamande@clemson.edu · (631) 721-7133 · 4 Memas Court, Dix Hills, NY 11746

WORK EXPERIENCE

Hillcrest Finance LLC

New York, New York

Summer Analyst Intern

07/2023 – 08/2023

- Completed underwriting reports and sized new and incoming Commercial Real Estate deals
- Monitored existing deals and analyzed sponsors involved in those deals
- Worked closely with colleagues on deals involving multiple asset classes across Commercial Real Estate
- Compared and generated sales/rent comps of comparable properties when analyzing deals through CoStar
- Contacted Investment Brokers and Appraisers across other firms nationwide to work with them on appraisals, financial models, and market research

Sixpack Coverage

Clemson, South Carolina

Co-Head Intern

01/2022 – 06/2023

- One of two head interns for a start-up media company that goes through a variety of topics ranging from sports to financial life advice
- Managed multiple Social Media accounts and helped grow the brand name around Clemson
- Sold and promoted merchandise

EDUCATION

Clemson University

Clemson, South Carolina

Wilbur O. and Ann Powers College of Business

Major: Bachelor of Science in **Financial Management** with an Emphasis in **Real Estate**

Minors: Accounting, Management

Graduation date: May 2024

Valencia Polytechnic University

Valencia, Spain

HONORS, CAMPUS ACTIVITIES, & COMMUNITY SERVICE

Phi Sigma Kappa, Social Fraternity, Member (September 2020 - Present)

Clemson Undergraduate Real Estate Club, Member (August 2022 - Present)

Clemson Undergraduate Finance Club, Member (August 2023 – Present)

Teen Promise, Dix Hills, New York - Co-Founder (2017 - Present)

A philanthropic project that serves hospitalized teenagers through 2 annual events

Clemson Club Wrestling Team, *Clemson, South Carolina (01/2022 – Present)*

Intramural Soccer Team, *Clemson, South Carolina (01/2021 – Present)*

Intramural Frisbee Team, *Clemson, South Carolina (01/2022 – Present)*

LANGUAGES: Expanding Spanish

SOFTWARE SKILLS: Sufficient in Excel

Melanie Martin
(843) 455-9095
mgm7@g.clemson.edu
<https://www.linkedin.com/in/melanie-martin-780114226>

EDUCATION

CLEMSON UNIVERSITY

Wilbur O. and Ann Powers College of Business

Bachelor of Science in Financial Management

Minor: Accounting, Emphasis: Corporate Finance

May 2024
GPA: 3.5/4.0

WORK EXPERIENCE

KYOCERA AVX COMPONENTS CORPORATION

Finance and Accounting Intern

Fountain Inn, SC
May 2022 – August 2022

- Prepared book-to-tax adjustments for the federal income tax return
- Updated the monthly accounting for Kyocera AVX Foundation using Excel
- Calculated state apportionment and several schedule M adjustments
- Used Oracle to pull data queries

SIP WHISKEY AND WINE BAR

Server

Greenville, SC
July 2021 – December 2021

- Ensured excellent customer service while serving food and drinks in a demanding environment
- Assisted teammates by maintaining order and cleanliness of bar at all times

OLD NAVY

Sales Associate

Myrtle Beach, SC
March 2020 – December 2020

- Met monthly credit card application goals by sharing benefits with customers
- Processed customer transactions using a cash register
- Addressed customer questions and concerns

ACTIVITIES

- Beta Alpha Psi September 2022 – Current
 - Provide tutoring to Clemson students for finance and accounting courses
 - Participate in community service events
 - Attend professional development events
- Women in Business August 2020 – Current
 - Attend networking and professional development events
 - Gain advice from female business leaders

AWARDS

- Dean's List Fall 2020 – Fall 2021

LICENSES AND SKILLS

- South Carolina Insurance Producer Issued July 2023
 - Life, Health, and Accidental Insurance
- Microsoft Excel, Tableau, Microsoft PowerPoint

Sean McClow

901-237-3770 | smcclow@clemson.edu
<https://www.linkedin.com/in/sean-mcclow-333521282/>

Objective: Seeking an internship or full-time position following graduation in the Risk Management and Insurance industry.

Education: **Clemson University, College of Business**
Bachelor of Science in Financial Management
Minor: Accounting, Emphasis: Corporate Finance
Graduating December 2023
Cumulative GPA: 3.68/4.0

Projects: **Capsim Simulation, Business Strategy Course** Clemson University
Semester long business simulation and competition. Summer 2023
Developed and implemented business strategies for R&D, Marketing, and Supply Chain functions for simulated business to achieve optimal financial results.

- Evaluated financial statements.
- Analyzed P&L statement against goals; made informed financial decisions to achieve strategic goals.

Investment Analysis Course Clemson University
Coursework consisted of multiple projects that evaluated mutual funds, yield curve analytics, value line, and stock market simulations. Spring 2023

- Analyzed performance of mutual fund to recommend investment.
- Utilized Bloomberg machines to analyze US Treasuries and yield curve analytics.

Experience: **Associate, Professional Party Rentals** Greenville, SC
Special events rental company. 2021
Responsible for loading, delivery, and setup / tear down of event rental items (furniture, lights, tents, etc.). Organized and maintained inventory of warehouse.

- Loaded and delivered goods in an efficient and professional manner.
- Provided onsite problem resolution and supported warehouse operations.

Team Manager, Moe's Southwest Grill Greenville, SC
Fast casual restaurant. 2017 - 2020
Energetic, service oriented shift leader that provided top notch customer service and trained ~10 team members. Responsible for catering orders.

- Promoted from team member to shift leader. As shift leader, assigned daily tasks to team members, monitored inventory levels, prepared for opening, and closed down shift.
- Ensured register and cash procedures were followed.
- Followed and enforced FDA guidelines when preparing food.

Technology: Bloomberg, Tableau, Excel, Microsoft Word, PowerPoint

Activities: Clemson Finance Club, Clemson Intramural Sports, Saint Vincent de Paul Society, Gibbs Cancer Center Survivor Support Volunteer, Captain for Riverside High School JV Soccer Team, National High School Honors Society, BETA Club

Jack McKennon

Nashville, TN | jfmcken@g.clemson.edu | [LinkedIn](#)

Education

Clemson University **May 2024**
Bachelor of Science in Financial Management
Minors: Accounting & Spanish Studies
Emphasis: Commercial Banking and Investment
Cumulative GPA: 3.30/4.0

Cultural Experiences Abroad (CEA) Barcelona Center Barcelona, Spain **Summer 2023**

Work Experience

Liberfield Capital- Specialization and Recruitment Program **August 2023- November 2023**

Analyst/Trader Internship

- Conduct research to identify the critical factors and catalysts in a group of stocks
- Help complement and hedge equity-driven investment strategies using derivatives and long/short pairs trading approaches
- Communicate investment ideas to a Portfolio Manager through oral and written analyses

Dream Hotels/ Stateside Kitchen **May 2022- January 2023**

Front Desk Assistant/ Server

- Provided assistance and excellent customer service to our guests including luggage help, room deliveries, and dealing with customer issues
- Closely trained and supported several new employees to guarantee consistent service

Leadership and Service

Sigma Nu Fraternity, Clemson University **August 2020- Present**
Treasurer **August 2020- January 2022**

- Organized and handled finances for various events and trips

Order of Omega, Clemson University **October 2022- Present**

- Current Member of on-campus Honor Society that enrolls top 5% of Greek members
- Involved in philanthropy events as well as working together as a society to better the Greek community

IFC New Member Mentor, Clemson University **August 2021- Present**

- Guided new members of the greek community through their new membership with weekly meetings
- Provided resources, assistance, and advice for new members

Dominican Republic Mission Trip **Spring 2017, 2018**

- Worked with Dominican staff and citizens on construction for new homes and markets
- Translated english to spanish and vice versa to help communicate with the locals effectively

Activities, Awards, and Certifications

Activities: Finance Club, Stock Club

Awards: Order of Omega

Certifications: Microsoft Excel Certification,
TrendUp Investment Training

Cooper McMichael

155 Anderson Hwy, Unit 110, Clemson SC 29631 | (864) 417-2736 | cooper.mcmichael@gmail.com
[linkedin.com/in/cooper-mcmichael-1a2a75253](https://www.linkedin.com/in/cooper-mcmichael-1a2a75253)

EDUCATION

Clemson University	Clemson, SC
Bachelor of Science in Financial Management	December 2023
<i>Minor: Accounting</i>	GPA: 3.22/4.00
Emphasis: Corporate Finance	

WORK EXPERIENCE

General Manager <i>Full Circle Café LLC</i>	Fall 2019 – Spring 2021 Anderson, SC
<ul style="list-style-type: none">Managed a team of up to eight staff members, demonstrating strong leadership and interpersonal skillsOversaw monthly sales tracking of up to \$70,000 and daily labor cost monitoring, showcasing financial acumen and budget management	
Owner and Manager <i>Power Washing and Painting Business</i>	Summers 2019 & 2020 Clemson, SC
<ul style="list-style-type: none">Analyzed and quoted properties based on square footage, demonstrating strong attention to detail and data-driven decision-making abilitiesRecruited and managed hourly employees, reflecting effective personnel management and organizational skills	
Executive Assistant <i>The Learning Factory LLC</i>	Summer 2019 Zephyrhills, FL
<ul style="list-style-type: none">Developed a culture assessment for future company analysis, exhibiting strategic thinking and initiative in process improvementUtilized Excel and Word for efficient client scheduling, demonstrating proficiency in essential software and time management skills	

ORGANIZATIONS AND VOLUNTEER WORK AND CERTIFICATIONS

Clemson University Finance Club	Fall 2022
Wall Street South Investment Club	Fall 2022
<ul style="list-style-type: none">Engaged in portfolio management using a paper trading account, honing skills in investment analysis and risk management	
Split Creek Goat Farm – Pendleton, SC	Spring 2022
Helping Hands of Clemson – Central, SC	Fall 2019
<ul style="list-style-type: none">Managed inventory and organization of incoming used clothing, demonstrating attention to detail and efficient resource management skills	
FMC® Level I Certification from Adventis	
<ul style="list-style-type: none">Built a three-statement, fully circular and properly formatted financial model, including a valuation, from scratch in under 90 minutesScored greater than 90% on a multiple-choice exam covering key concepts in financial modeling, accounting, and corporate finance	

TECHNICAL SKILLS

Microsoft Excel • JMP Pro 14 • Tableau 2019 • Piktochart • Adobe Photo • Microsoft Access

UPCOMING INTERNSHIP

Forensic Accounting and Business Valuation <i>GreerWalker</i>	Spring 2024 Charlotte, NC
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GRACE MEISSNER

gmeissn@clemson.edu • 443-286-3119 • 14888 Union Chapel Rd • Woodbine, MD 21797

EDUCATION

Clemson University, Wilbur O. and Ann Powers College of Business **Clemson, SC**
Bachelor of Science in Financial Management May 2024
Minor: Accounting, Emphasis: Corporate Finance
Cumulative GPA: 3.89/4.00
President's List: Spring 2021, Fall 2021, Spring 2022, Fall 2022

INVOLVEMENT

CFA Investment Research Challenge **Clemson, SC**
Team Member August 2023-present

- Selected as one of ten finance students to represent Clemson University in an intercollegiate challenge to prepare an equity analysis report on a publicly traded company.
- Act as an independent research analyst to provide Buy/Sell/Hold recommendations through detailed analytics.

Seminar for Level 1 CFA Exam August 2023-present
Group Member

- Chosen by Clemson Professors to receive a CFA student scholarship for the Level 1 Exam in May 2024.
- Prepare outlines and collaborate with the other students to study for the exam. Weekly meetings for presentations, discussing sample problems, and completing practice exams.

Wall Street South Investment Club
Member

- Gained experience using the Bloomberg Financial Market Machines and learned from speakers who focused on investment banking, managing portfolios, and trading securities

WORK EXPERIENCE

Ruppert Properties **Frederick, MD**
Commercial Real Estate Accounting Intern Summer 2021 & 2022

- Completed balance sheet account reconciliations and participated in month-end closing procedures.
- Assisted with accounts receivable and accounts payable functions including recording cash receipts, updating vendor files, and processing invoices.
- Observed the preparation of the financials statements and performed financial analysis pertaining to operations and tenants.

YogaSix **Columbia, MD**
Wellness Advisor for Yoga Studio Summer 2023

- Advised clients on the best membership option for them after analyzing their goals, budget, and lifestyle.
- Proposed and participated in fundraising opportunities to expand our clientele and gained sales and customer service experience to transform prospects into members.
- Responsible for opening and closing the studio, gathering payment from customers, and forming personal connections that led to record high sales for the franchise in the months of July and August.

Walker's Tap and Table **Glenwood, MD**
Hostess 2019-2020

- Trained and guided new hires on the rules, expectations, and appropriate behavior needed in the restaurant business.
- Managed the pacing of the restaurant, collaborated with other employees to provide a well-rounded experience for the guests, and excelled in conflict resolution in a fast-paced environment.

SKILLS & INTERESTS

- Microsoft Excel, experience with SQL, Power Query, Google Applications, PowerPoint
- Involved member of the Clemson Sailing Club, completing a 200-hour Yoga Teacher Training Certification, boating, snowboarding, reading, and playing tennis.

Will H. Mercer

willmercer13@gmail.com | 843-708-0021 | www.linkedin.com/in/will-h-mercer

EDUCATION

Clemson University Honors College May 2024
Bachelor of Science in Financial Management - Emphasis in Corporate Finance Clemson, SC
Minor in Accounting 3.74/4.00 GPA

WORK EXPERIENCE

Truist Securities May 2023-August 2023
Corporate & Investment Banking Summer Analyst Atlanta, GA

- Underwrote 2 annual reviews for healthcare companies and presented them to senior leadership.
- Analyzed companies based on their recent financial performance and determined their credit risk.
- Modeled financials for 2 companies and constructed 7-year projections based on credit research and historical performance.
- Attended multiple lender calls and screens and aided analysts through detailed note taking.

Bohicket Marina and Market May 2022-August 2022
Dockhand Johns Island, SC

- Oversaw around 2 boat rentals a day and guided renters through the boat operations process.
- Inspected fuel tickets for accuracy and monitored payments through a point of sale system.
- Assisted the marina manager with dry stack operation and maintenance.
- Maintained marina organization and cleanliness.

LEADERSHIP AND INVOLVEMENT

The International Fraternity of Delta Sigma Pi October 2021-Present
Social Chair Clemson, SC

- Conducted a variety of events and social gatherings for over 100 brothers and guests.
- Interacted in weekly executive board meetings to discuss and evaluate chapter affairs.

Member

- Completed a 5 week pledgeship program constructed to promote business and leadership skills.
- Participate in various community service and professional development events hosted by the fraternity.

Clemson University Investment Banking Club January 2022-Present
Analyst Clemson, SC

- Engage in various recruitment and networking events hosted by different investment banks.
- Gain useful advice from incoming investment banking interns.

Transfer 2 Tiger Mentor Program January 2022-Present
Peer Mentor Clemson, SC

- Act as a guide for 4 transfer students as they transition into Clemson and assist them with related dilemmas.
- Identify common struggles shared among new transfer students and establish potential solutions.

Camp Keoka June 2019-July 2021
Co-Founder and Head Organizer Waterford, ME

- Introduced Camp Keoka as a co-founder to 26 campers/guardians in 2019.
- Orchestrated and developed the camp schedule and itinerary for 2 consecutive camp periods and counting.

LICENSES AND CERTIFICATIONS

- Truist Emerging Leaders Certification February 2022

HENRY M. MICHELS

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EDUCATION

CLEMSON UNIVERSITY, MAY 2024 GRADUATION
BACHELOR OF SCIENCE IN FINANCIAL MANAGEMENT, REAL ESTATE EMPHASIS,
ACCOUNTING MINOR

EXPERIENCE

JUNE 2023 – AUGUST 2023

CREDIT ANALYST, BAYVANGUARD BANK, EASTON MD, INTERNSHIP

- Full-time analyst responsible for completing financial spreads, global and discounted cash flows, property specific worksheets, and risk grade analysis. Responsible for underwriting on multiple loan packages passed through executive loan committee.

JUNE 2022 – AUGUST 2022

CAMP COUNSELOR, THE SCHUSTER FOUNDATION, RIVER FARM CAMP

- Led and supervised groups of children aged 4 through high school from low-income households in Baltimore MD. Responsible for organizing and facilitating team building, STEM, and recreational activities. Demonstrated leadership skills and served as positive role model for campers.

MAY 2021 – JUNE 2022

GOLF CART ATTENDANT, TALBOT COUNTRY CLUB

JUNE 2020 – AUGUST 2020

GOLF CART ATTENDANT, LINKS AT PERRY CABIN

CLUBS/ORGANIZATIONS

- Phi Delta Theta
- Finance Club
- Wall Street South Investment Club
- Real Estate Club
- National Honors Society
- Future Business Leaders of America (FBLA)

COMMUNITY SERVICE

- St. Vincent de Paul (Volunteer since 2012, Club Member, over 200 hours logged)
- Critchlow Adkins (Summer Volunteer)
- Greenville Humane Society (Foster Care)
- Talbot Optimists Club (Holiday Volunteer)
- Fraternity Philanthropy (ALS Awareness)

Alex H. Miller

Annapolis, Maryland | ahmille@clemson.edu | 443-743-9237

EDUCATION:

Clemson University, Clemson, South Carolina

Bachelor of Science in Financial Management, May 2024

Emphasis: Banking and Investments

Minor: Accounting

Overall GPA: 3.60/4.0

WORK EXPERIENCE:

Matthews Real Estate Investment Services Intern – Atlanta, GA (May 2023 – August 2023)

- Conducted market research and compiled a database of properties and owners that were used to create client leads
- Collaborated with my mentor in the underwriting and drafting of a broker opinion of value (BOV) for clients
- Gained insights and applied learnings in commercial real estate investment sales, leasing, and capital markets

Short Hop Moving, LLC Residential Mover – Annapolis, MD (May 2022 – September 2022)

- Worked with teams of 3-6 men on residential home moves throughout the state of Maryland
- Consulted with customers to arrange furniture layouts in new houses as furniture was unloaded off our truck

Eagle Title, LLC Post Closer – Annapolis, MD (May 2021 – September 2021)

- Prepared insurance policies by compiling and inputting information from client files that were submitted to corresponding insurance companies and individual clients
- Communicated over the phone and through email correspondence with insurance companies to keep them updated on the progress of their client policies
- Trained new post-closing employees on the skills and information required to prepare title insurance policies

Effort, LLC Construction Assistant – Washington D.C. (June 2020 – August 2020)

- Set up fences and barriers that were used for crowd control during events held on the National Mall

Elvaton Recreation Association Senior Basketball Referee – Annapolis, MD (November 2015 – December 2019)

- Worked with Junior Referees to officiate youth basketball games for boys and girls aged 10-14
- Trained Junior Referees in the rules of basketball as well as the process of officiating basketball games

ACTIVITIES

Wall Street South Investment Club Member (August 2022 – Present)

- Managed an online portfolio of stocks and ETF's and met with guest speakers working in the portfolio management field to gain knowledge and experience with stock market trading
- Worked on the Clemson University Bloomberg terminal to access real-time data analytics used in the management of my portfolio

Clemson Beta Theta Pi Rush Committee Member (November 2021 – November 2022)

- Partnered with the Fraternity Rush Chair as well as other members of the Rush Committee to meet students on campus who had interest in joining our chapter
- Planned events such as cookouts and sporting events where interested students could come and get to know the members of our chapter
- Organized lunch and dinner meetings where current chapter members met with interested students to help them understand the values of our chapter and the expectations required for being a member

JT Miller

Beaufort, SC 29902 | 843-592-5491 | jtmiller270@gmail.com

EDUCATION

Clemson University | Bachelor of Science in Financial Management

May 2024

- **Emphasis:** Corporate Finance
- **Minor:** Accounting

GPA: 3.7/4.0 Major GPA: 4.0/4.0

Financial Modeling Course® Level II Certification from Adventis

- Built a three-statement, fully circular and properly formatted financial model from scratch in under 90 minutes
- Scored greater than 90% on two multiple choice exams covering key concepts in financial modeling, accounting, corporate finance, intrinsic and relative valuation, and leveraged buyout transactions

EXPERIENCE

Citizens Financial Group

May 2023 - August 2023

Investment Banking Summer Analyst

Charlotte, NC

- Analyzed financial statement trends, prepared comparable company and precedent transaction analyses, and developed leveraged buyouts and financial models for companies above \$10M EBITDA
- Supported junior and senior team members in developing new business ideas, pitch strategies, or transaction structuring scenarios (inclusive of debt and/or M&A) to help the firm's corporate and sponsor clients

Compass Group

June 2022 - August 2022

Sales Finance Intern

Charlotte, NC

- Analyzed financial models and free cash flow projections for deals worth over \$1.5M
- Determined the amount of capital investments required to achieve a minimum IRR and ROCE of 20%
- Forecasted out revenue and expenses for dining operations across 5 to 10 year contract periods
- Performed benchmark analysis of key performance indicators for companies and their competitors

Brays Island

June 2021 - August 2021

Operator

Beaufort, SC

- Worked closely with management to perform routine ground maintenance with a budget of \$1.2M
- Worked on a team of 3 to 4 people during operation and monitored the golf course to determine areas of concern and quickly address problems

CAMPUS INVOLVEMENT

Investment Research Club

September 2022 - Present

Executive Director

Clemson, SC

- Responsible for the day-to-day operations of the club including, but not limited to: directing committee head activity, presiding over club meetings, and maintaining orderly communication between research directors and analysts
- Create slideshow templates to organize investment research and corporate financial data such as net income, EBITDA, EPS, and DCF valuation to facilitate club investment decisions

Phi Kappa Tau Fraternity - Founding Father

September 2022 - Present

Rush Committee

Clemson, SC

- Assist rush chair with developing recruitment strategies for more than 400 potential new members
- Plan between 3 to 6 recruitment events per semester to promote fraternity values with a \$7,000 budget

Investment Banking Club

February 2022 - Present

Member

Clemson, SC

- Participate in meetings that discuss financial modeling, networking skills, and valuation concepts
- Collaborate with 13 other candidates to partake in investment banking technical training courses

Finance Student Advisory Board

February 2022 - Present

Member

Clemson, SC

- Represent approximately 900 students in the Department of Finance
- Work with a 15 person board to plan out and execute events to engage finance students
- Create a weekly finance newsletter to increase student engagement and interaction by at least 15%

ADDITIONAL INFORMATION AND INTERESTS

- Eagle Scout, Baseball, Hiking, Camping, Spike Ball, Atlanta Falcons, Running

SEAN MILLER

Greenville, SC | (703) 727-3076 | linkedin.com/in/sean-miller14 | sgm614@icloud.com

EDUCATION

Clemson University

Bachelor of Science in Financial Management, Emphasis: Corporate Finance; Minor in Accounting

May 2024
GPA: 3.4/4.0

WORK EXPERIENCE

Hobbs & Associates, HVAC Contractor

Finance & Operations Intern

Virginia Beach, VA

Summer 2023

- Developed pricing and cost models for potential business opportunities
- Presented job pricing models to internal review board for approval
- Worked closely with manufacturers to develop and promote HVAC products to end users
- Analyzed and compared competitive product costs

Chick-fil-A

Team Member, Customer Delivery Lead.

Greenville, SC

May 2019-Present

- Promoted from Team Member to Delivery Lead
- Manage \$1,000 transactions daily while operating cash register and speaking with guests
- Lead a team of 10+ coworkers in organizing and executing customer deliveries

Chick-fil-A

Team Member

Ashburn, VA

May 2018-August 2018

- Collaborated with 20+ colleagues to ensure best possible customer service
- Reported and responded to guests' concerns and complaints with an empathetic mindset
- Committed to embodying Chick-Fil-A's core values of integrity, customer service, and work ethic

CAMPUS INVOLVEMENT

Wall Street South Investment Club

Member

Clemson, SC

August 2022-Present

- Gain hands-on experience in trading securities and managing an investment portfolio
- Participate in global portfolio simulation with \$100,000 of hypothetical money to trade and manage
- Attend guest speaker sessions and financial training meetings to expand financial knowledge

Club Tennis

Active Player

Clemson, SC

August 2020-Present

- Attend 4+ regular practices per week while managing coursework
- Play in weekend-travel tournaments; qualify for tournaments through skill level and attendance

Clemson Snow and Ski Club

Treasurer

Clemson, SC

August 2023-Present

- Manage comprehensive financial activities for the club
- Develop tracking system to maintain membership activities and finances
- Present to the Student Funding Board to solicit funds for future years

AWARDS & ACHIEVEMENTS

South Carolina Life Scholarship: Awarded to high-performing students – 4-year recipient

Chick-Fil-A Annual Scholarship: Multi-year recipient of highly competitive Chick-Fil-A Scholarship

Self-financed 50% of college costs

EDUCATION

Clemson University

Bachelor of Science in Financial Management (Corporate Finance Emphasis) and Accounting Minor (Current GPA 3.83/4.0)

Clemson, SC

May 2024

- President's List: Spring 2021, Fall 2021, Spring 2023
- Dean's List: Fall 2020, Spring 2022
- Member of the Sigma Nu, Theta Zeta Chapter
- Play intramural basketball and flag football with fraternity team
- IPTAY Member

WORK EXPERIENCE

The Runnymede Corporation

Asset Management Intern

Virginia Beach, VA

May 2023 – July 2023

- 10 week internship where I worked with the asset management team and also routinely engaged with President and CEO on a variety of Commercial Real Estate projects
- Duties included: lease analysis, sales and land comparisons, development analysis, market research, underwriting, land valuation and presenting

Hampton Roads Association for Commercial Real Estate (HRACRE)

6-week Summer Internship Program

Hampton Roads, VA

June 2023 – July 2023

- Attended meetings with local commercial real estate professionals and visited important local sites (Port of Virginia, Current Multifamily Development, and others)

Cavalier Golf and Yacht Club

Lifeguard, Head Lifeguard, Pool Manager

Virginia Beach, VA

*Summers of 2018, 2019,
2020, 2021, 2022*

- CPR, AED, First Aid Certified
- Was promoted to Head Lifeguard after second summer
- As Head Lifeguard, gained my pool operator certification which required me to make sure the pool filters and pumps were working correctly
- Also oversaw the lifeguards and making sure the pool and deck were safe
- Was promoted to Pool Manager in 2022
- As manager, I made schedules, held and ran bi-monthly training sessions for the lifeguards and handled daily member relations

Galilee Church (Volunteer Work)

Student Leader/ VBS Teacher

Virginia Beach, VA

2017, 2018, 2019, 2020

- An active part in my church and taught 1st graders in Sunday School weekly

Entrepreneurship

Shore Drive

Co-Founder

- Started a small clothing business with friends in high school over the summer after graduating

ADDITIONAL INFORMATION

Skills: Investment Analysis, Commercial Real Estate Asset Management

Computer: Proficient in Microsoft Office applications, CoStar, and Yardi

Interests: Stock Market Trading, Sports

Emory Moore

530 Yuma Ct | Sumter, South Carolina 29150 | 803-972-3540 (cell) | moore.emorysc@gmail.com

EDUCATION

Clemson University, Clemson, SC May 2024
Bachelor of Science in Financial Management GPA: 3.37/4.0
Emphasis: Financial Planning
Minor: Accounting

PROFESSIONAL EXPERIENCE

Summer Intern Summer 2023
Atlantic Casualty Insurance Company Goldsboro, NC

- Shadowed each department and formed a holistic understanding of the insurance industry.
- Collaborated with the intern class on a project to scale the company by effectively recruiting young talent.

Management Intern Summer 2022
Guaranteed Supply Company Greenville, SC

- Learned the business cycle of construction material sales by participating in each part of the process.
- Received and created purchase orders, packaged and delivered goods to job sites, operated machinery such as a forklift, and spent substantial time managing branch inventory and analyzing sales patterns.

Owner/Operator March 2022 - August 2022
Heartily Power Washing Sumter, SC

- Offered measured estimates, negotiated terms, and white-washing, gutter cleaning, stain removal, and power washing services for clients in the midlands of South Carolina.
- Generated over \$27,000 of revenue with \$4,000 of purchased equipment.

LEADERSHIP EXPERIENCE

Chapter President January 2023 - Present
Beta Upsilon Chi Fraternity - Clemson University Clemson, SC

- Facilitated the day-to-day operations of the fraternity, such as event planning, budgeting, and standards.
- Led the Executive Officer Corps, communicated with the Alumni Board, and corresponded to the governance of BYX National Staff, Inter Fraternity Council, and Office of Fraternity and Sorority Life.

Chaplain January 2022 - December 2022
Beta Upsilon Chi Fraternity - Clemson University Clemson, SC

- Served as an executive officer, cultivating a flourishing spiritual culture within the fraternity.
- Organizing spiritual structure through seventeen chair positions, planning events, and booking locations for bible studies, worship nights, and fraternity rituals.

AFFILIATIONS & AWARDS

Clemson Beta Upsilon Chi Fraternity - *executive officer, chair, brother* March 2021 - Present

- IFC Chapter of the Year, *chapter recipient* 2022 & 2023
- Selected by BYX National Staff for COR Leadership Program, *recipient* 2022

Intramural Athletics - *football and basketball* March 2021 - Present
LifePoint Church - *Servant Team, Member* August 2021 - Present
Clemson FCA - *Small Group Leader, Member* January 2021 - May 2022

Carolyn Mullins

cbmulli@g.clemson.edu • (978) 399-9992
46 Acorn Path, Groton, Massachusetts

EDUCATION

Clemson University, Powers College of Business

Bachelor of Science in Financial Management

Minors: Accounting and Management

Emphasis: Financial Planning

Clemson Honors College

Clemson, SC

May 2024

GPA: 3.65/4.00

Lorenzo de' Medici Study Abroad Program *Spring 2023*

Florence, Italy

WORK EXPERIENCE

Northeast Planning Associates

Intern at the Office of Gary Pelletier

Nashua, NH

Summer 2023

- Calculated and ran Required Minimum Distribution reports for qualifying clients
- Sat in on the delivery of a financial plan, taking notes and immersing in discussion afterwards
- Engaged in discussion in lessons about structured notes, able accounts, career tips, etc.
- Maintained high standards of accuracy and productivity among uploading, organizing, and sorting through hundreds of files
- Recognized for hard work with an offer to write a recommendation letter, and create a job position for after graduation

Summer Village Restaurant

Bartender, Server

Westford, MA

Summer 2022

- Selected by management to train new servers on operations, customer service, and restaurant software system
- Learned the names and drink orders of many members of the private condo association
- Maintained a clean and organized bar area
- Kept the inventory well stocked based on anticipated demand
- Increased sales volume by creating and promoting a new drink
- Done with diligence and a smile to ensure satisfaction
- Made recommendations based on customer needs

COMPUTER SKILLS

Bloomberg Market Concepts Certified

Microsoft: Word, PowerPoint, Excel, Power Query, Power BI, Power Adequate

Tableau: Prep Builder, Desktop, Public

Google: Docs, Sheets, Slides, Drive

CAMPUS INVOLVEMENT

Women in Business Club

Finance Club

KATHERINE (KATIE) MULLIN

ekamullin@gmail.com | 610-350-1210 | Malvern, PA 19355

EDUCATION

Clemson University, College of Business

Clemson, SC

Bachelor of Science in Financial Management

May 2024

Emphasis Area in Financial Services, Minor in Accounting

Dean's List Fall '20-Spring '22

GPA 3.67/4.0

Lorenzo de Medici

Florence, Italy

Study Abroad Program

Spring 2023

WORK EXPERIENCE

Bryn Mawr Trust A WSFS Company

Berwyn, PA

Wealth Management Intern

June 2023-August 2023

Worked closely with and supported wealth advisors, investment advisors and wealth strategists.

Learned how to create financial plans in e-money, trust summaries, investment research and portfolio reports.

Wealth Enhancement Group

Malvern, PA

Intern

December 2021-July 2022

Developed and strengthened skills in excel, Salesforce, and other software.

Researched for a new financial planning team working with families who have children with special needs.

Andy Talley Bone Marrow Foundation

Devon, PA

Marketing Team

March 2019-August 2020

Helped as one of the staff for two annual fund-raising events, including auctions, dinner and entertainment for over a thousand people.

Researched to help build the data base for the company.

Icona

Avalon, NJ

Waitress

Seasonal May 2021-August 2023

Worked at one of the largest restaurants and hotels in town. Serving hundreds of people each day.

Sylvester's Fish Market and Restaurant

Avalon, NJ

Waitress, Hostess, Food Runner

Seasonal May 2018-August 2020

Worked in a busy, fast-paced seafood market and restaurant (promotions each year from dishwasher to hostess to head waitress).

INVOLVEMENT

Women In Business Organization

Clemson, SC

Attend events that host professional business leaders exposing women to the knowledge of how to succeed in the business world.

Active Minds Organization

Clemson, SC

One club, a part of a national organization, which supports and spreads awareness for mental health.

Alpha Chi Omega (Theta Lamda)

Clemson, SC

A part of the philanthropy committee hosting events and raising money for domestic violence awareness.

Fellowship of Christian Athletes

Clemson, SC

Volunteer for CLEMSON LIFE

Clemson, SC

Classroom assistant and activity peer for ClemsonLIFE which is a program that provides young adults with intellectual disabilities the life skills to ultimately obtain independent living and employment. As classroom assistant we taught students about finances.

Grace Murn

gmurn@g.clemson.edu • 571-999-3634 • [linkedin.com/in/gracemurn/](https://www.linkedin.com/in/gracemurn/)

EDUCATION

Clemson University – Wilbur O. and Ann Powers College of Business

Bachelor of Science in Financial Management

May 2024

- Minor in Accounting, Emphasis in Real Estate
- Cumulative GPA: 3.05/ 4.00

EXPERIENCE

MILL CREEK RESIDENTIAL TRUST

Arlington, VA

May 2023 – July 2023

Leasing Consultant Intern

- Participated as a leasing consultant on a property management team at a brand-new property going through lease up.
- Managed and oversaw lease applications, as well as touring prospective residents and investors.
- Updated market comp. information and made sure marketing information was up to date on numerous online platforms.
- Organized move-ins of residents including required financials, walk-throughs, and scheduling.

CBRE

Washington, DC

June 2022 – July 2022

Multifamily Investment Sales Intern

- Administered weekly marketing reports to clients about investor activity, as well as tour reminders.
- Researched and analyzed market trends and property values.
- Participated in client-facing brokerage opportunities such as investor tours, weekly marketing calls, and FCG reports.
- Worked with a team of other interns on a Mid-Atlantic pitch competition.

Clemson University

Clemson, SC

Concierge WATT Center

September 2021 – May 2023

- Facilitated student and staff inquiries, reservations and student check-in.
- Upheld school policy at front desk of a main academic building.

ACTIVITIES AND CLUBS

Clemson Real Estate Club

Clemson, SC

Member

January 2022 – Present

- Listen and interact with speakers that are highly experienced commercial and residential professionals.

Finance Club

Clemson, SC

Member

August 2023 – Present

- Interact with other finance majors and companies looking to hire for internships and full-time work.

Clemson Life

Clemson, SC

Student Volunteer

September 2021– Present

- Completed Student Life training in school policies and protocols.
- Assist student with intellectual disabilities in social engagement and daily life skills while creating a normal college experience.

STEVEN NEESE

Fort Mill, SC



980-307-2730



sneese@g.clemson.edu



Linkedin.com/in/steven-neeese

EDUCATION

B.S. IN FINANCIAL MANAGEMENT WITH AN EMPHASIS IN CORPORATE FINANCE, May 2024
Clemson University – Clemson, SC

- Minors: Accounting, Cyber Security
- GPA: 3.2/4.0

PROFESSIONAL EXPERIENCE

FINANCIAL SERVICES FIELD INTERN 05/2023-08/2023

Thrivent Financial – Charlotte, NC

- Worked alongside portfolio managers and advisors to develop customized investment strategies aligned with clients' risk tolerance and financial objectives.
- Provided exceptional client service and using MoneyGuidePro as a tool in delivering personalized and impactful financial advice.
- Proficient at building strong client relationships using Salesforce.
- Incorporated behavioral finance theories into financial planning strategies, aligning recommendations with clients' behavioral tendencies.

LIFEGUARD/BEACH ATTENDANT 05/2022 - 08/2022

John's Beach Service – Myrtle Beach, SC

- Managed cash transactions and process credit payments with accuracy, handling an average of \$2,500 daily.
- Demonstrated exceptional customer service skills, ensuring a positive experience for 1000+ customers.
- Implemented safety protocols and performed first aid procedures, ensuring the well-being of patrons.

OFFICE ASSISTANT 06/2018 - 07/2021

Orbis, Inc. – Charlotte, NC

- Collaborated upper with management professionals to complete complex research and data analysis projects.
- Completed clerical tasks such as filing, copying, and distributing mail.
- Verified accuracy of business records by consistently updating customer information.

LICENSES AND CERTIFICATIONS

- Securities Industry Essentials (SIE) from FINRA – July 2023
- FMC Level I Certification from Adventis – June 2023
- Diversity, Inclusion, and Belonging for All from LinkedIn Learning – June 2023

SKILLS

- Excel
- MoneyGuidePro
- SalesForce
- Python (Basic)
- Data Analysis
- Financial Modeling

ACTIVITIES AND INTERESTS

- Alpha Tau Omega
- Finance Club
- Clemson Bass Fishing Team
- Entrepreneurship Club

Luke Nordin

4640 Palmetto Lane, Cumming 30041 – (678) 936-3829

lnordi@g.clemson.edu - <https://www.linkedin.com/in/luke-nordin-2365661ba/>

Education

Clemson University

August 2020 - present

- Bachelor of Science in Financial Management/Minor in Accounting
- 92 credit hours completed
- Relevant Coursework – Financial Accounting, Financial Management, Personal Finance, Cost Accounting, Investment Analysis, Taxation, Entrepreneurship
- Member of the Club Tennis Team
- Member of the Wall Street South Investment Club
- Expected Graduation - May 2024

Notable Projects (Investment Analysis)

- Value Line/Wall Street Journal Project – Utilized Bloomberg Terminals in the business college to value a portfolio of stocks and compared the data found from Bloomberg with Value Line. Made stock recommendation to the professor and analysis of my selection.
- Mutual Fund Analysis Project – Operated Bloomberg Terminals to evaluate a selected mutual fund by their classification, portfolio managers, fund information, top holdings, sector analysis, fees and expenses, performance, and their benchmarks.
- Corporate Bond Analysis – With the data available on Bloomberg Terminals, analyzed corporate bonds by their spread, yield, coupon rate, S&P/ Moody's rating, benchmark risk, maturity, and convexity. Proposed the bond yielding the highest return given minimal risk.

Software Skills

- Microsoft Word, Excel, PowerPoint and Tableau
- Working towards a Bloomberg Certification

Experience

Epic Tech, LLC. Financial Analyst

May- August 2023

- Created multiple models in Excel that were used to forecast on a combined income statement
- Analyzed the proper raw data to flow through the models and be used for future decision making
- Worked with multiple department heads to plan out a budget
- Sat in on multiple meetings where I had to present the models I was creating and explain how they work

Nelson Mullins Riley and Scarborough, LLC Operations Intern

May – July 2022

- Wrote legal documents in the closing stages of a merger or acquisition
- Performed background checks on potential jurors
- Sat in on meetings that involved giving businesses legal advice on how to maximize returns
- Conducted data entry in Excel daily
- Compiled multiple depositions and organized them for the attorneys to review

Robbie Henderson Surveying Crew Member/ Apprentice

May – August 2021

- Reading coordinates off a plat and transferring that data into the GPS (Carlson Software)
- Troubleshooting GPS issues, by using the laser gun to get shots and store data points
- Utilizing the data points from a job and drawing a plat

William C. O'Connell

wc.oconnell18@gmail.com; 617-943-4974

EDUCATION

CLEMSON UNIVERSITY | 3.8/4.0 GPA | CLEMSON HONORS COLLEGE

Clemson, SC

Bachelor of Science in Financial Management

Class of 2024

Emphasis: Corporate Finance

Minor: Accounting

- Clemson University Finance Club
- Wall Street South Investment Club

WORK EXPERIENCE

INVESTMENT INTERNSHIP | LIBERTY MUTUAL INSURANCE

Boston, MA

Investment Accounting Operations Team

Summer 2023

- Tracked ~60 unique private credit deals by building Excel sheets that estimate interest payments and compare them with CAMRA, Recon, and the Remit notices from the deal agents.
- Enhanced data analytics skills, collaborated with higher-ups, and improved data accuracy.
- Developed knowledge of the private credit world and gained valuable system experience.
- Managed and corrected a daily population of trades that didn't flow from Aladdin to CAMRA correctly.

FINANCE INTERNSHIP | LIBERTY MUTUAL INSURANCE

Boston, MA

Global Retail Markets (GRM) US Strategy Team

Summer 2022

- Researched potential independent agent investment channels to drive a leading position in to narrow the gap between Liberty Mutual and Progressive.

GRM Competitor Intelligence Team

- Analyzed monthly M&A activity, Progressive monthly results, and competitor profiles to report accurate comparisons between LMG and competitors.
- Synthesized competitor data, supported production of competitor Q2 earnings analytical packages, and reported results to Executive Leadership.

BLACK ROCK COUNTRY CLUB

Hingham, MA

Bag Room / Caddy

Sept 2018 – Aug 2021

- Managed golf bags and equipment, sales of golf equipment and merchandise, maintained a clean environment for members and formed strong relationships with members.
- Improved the sales of the Pro Shop by designing new merchandise that sold out in two weeks.

LEADERSHIP, SKILLS & HONORS

LEADERSHIP

Clemson University Phi Delta Theta SC Gamma

Dec 2021 – Current

- Executive Council, Head of Alumni Relations, Philanthropy Committee, Rush Committee, and Social Committee.

Hingham High School

2016 – 2020

- Hingham High School Basketball Varsity Captain and Patriot League Champion, Hingham High School Track and Field: Two-season high jump captain, Undeclared Patriot League Champion.

S.N.A.P. (Special Needs Athletic Partnership) Volunteer/Coach

Sept 2016 – Current

- Volunteer as a mentor to special needs members of the community in a welcoming environment, where we teach them soccer and social skills and also create friendships.

SKILLS

- CAMRA, Blackrock Aladdin, Recon 7.0 and 7.2, Excel, Powerpoint

HONORS

- Panthers-Richardson Scholarship, Merit-Based Tuition Scholarship, Black Rock Cares Scholarship

References Available Upon Request

DONIVAN OKOLITA

443-545-6266

donivanoko1125@gmail.com

PROFESSIONAL SUMMARY

Dedicated finance student with a keen interest in the intersection of finance and real estate. Leveraging a solid academic background in finance and a passion for the real estate market. Experienced in financial analysis, investment evaluation, and market research. Eager to apply theoretical knowledge to practical scenarios within the real estate industry. Adept at utilizing data-driven insights to identify lucrative investment opportunities and mitigate potential risks. Seeking a dynamic role that allows me to contribute to strategic decision-making while honing my skills in real estate finance.

EDUCATION

Bachelor of Science (B.S.) in Financial Management
Clemson University

May 2024

- Minor in Accounting and Emphasis in Real Estate

EXPERIENCE

Training Manager
Chick-Fil-A

May 2018-May 2021
Clarksville, MD

- Lead front-of-house shifts for teams of over 30 coworkers after 12 months of initial employment.
- Mentored and coached team members to enhance their training delivery skills, providing constructive feedback and support to elevate their capabilities as effective team members.

Golf Caddie
TPC Potomac

April 2022-Present
Potomac, MD

- Fostered positive relationships with players, adapting communication styles to match individual preferences, and anticipating their needs to create a personalized service.
- Adapted to changing weather conditions, course layouts, and player dynamics, showcasing flexibility and a proactive approach to address challenges.

Philanthropy Chairman
Sigma Alpha Epsilon

May 2021-May 2022
Clemson, SC

- Orchestrated and executed philanthropic initiatives, overseeing fundraising campaigns and events that raised over \$10,000 for charitable causes during tenure.
- Collaborated with fraternity members, local businesses, and community organizations to develop and execute creative fundraising strategies to benefit local and national charities.

SKILLS

Microsoft Office

Financial Analysis

Analytical Thinking

ERIN A. O'LEARY

(484)-844-3320 | eoleary@g.clemson.edu

EDUCATION

Clemson University | Wilbur O. and Ann Powers College of Business | May 2024
• Bachelor of Science in Financial Management | Minors: Accounting & Management GPA: 3.84/4.0

HONORS

Order of Omega April 2022 - Present
Honor society for the top academic 5% of Greek Organization members, recognizing juniors and seniors who have exemplified high standards of leadership.

Clemson University President's List (4.0) Fall 2020 - Spring 2022

Adiletta Annual Family Scholarship Fall 2021 - Spring 2022

PROFESSIONAL EXPERIENCE

Bank of America | Financial Management Analyst Program Intern | Charlotte, NC June 2023 - August 2023

- Analyzed internal technology costs for the Global Technology and Operations Finance division and evaluated the drivers for these expenses and generated solutions to reduce these costs.
- Collaborated with team members to help create an internal subledger for P&L expenses in replacement of the current model.
- Reviewed and created reports for Management Inventory Report Review meetings to be more effective and consolidate reports.

CHUBB | Finance Intern | Philadelphia, PA May 2022 - August 2022

- Supported projects, completed reviews, and updated accounts to consolidate financial records.
- Partnered in a project to increase account model's efficiency and developed a master presentation using Cognos and People Soft.
- Researched paid losses and created report for Management Audit Committee.

Powell Electronics | Supply Chain & Inventory Representative | Swedesboro, NJ May 2021 - August 2021

- Filled component part orders within designated timeframe for assembly team.
- Catalogued electronic parts for inventory review.
- Maintained an energetic and professional demeanor while interacting with employees and supervisors.

LEADERSHIP

Delta Zeta Sorority | Clemson University August 2020 - Present
Research Chair – Diversity and Inclusion: Develops, organizes, and oversees programming designed for student awareness and education on social issues and pressures. Designs and implements events to coordinate with the academic calendar and adherence to organizational budget.

Finance Club | Clemson University August 2021 - Present
Active Member - Participates in speaker series focused on increasing knowledge on financial management.

Women in Business | Clemson University August 2020 - Present
Active Member - Assists in promoting events that further women's knowledge on how to succeed.

SKILLS

Excel | Word | PowerPoint | Tableau | Cognos | SQL

Madison Marie Osmussen

11092 E. Evans Rd. Scottsdale, AZ | 480.466.1966 | mosmuss@clemson.edu |

EDUCATION

Clemson University | Clemson, SC | Class of 2024

- Clemson Honors College
- Bachelor of Science in Financial Management
- Minor in Management, Emphasis in Corporate Finance
- 3.92 GPA; President's List (Fall 2021, Spring 2021 & 2022), Dean's List (Fall 2020 & 2022)

WORK EXPERIENCE

Accenture | *Summer Analyst Intern* | June 2023 – August 2023 | Dallas, TX

- Part of the Client Transaction Servicing Group (CTS)
- Prepared and analyzed financial models and pricing deals for various clients
- Provided financial costing, ratio analysis, and deal shaping to support Accenture's teams
- Created and presented internal business cases to analyze the justification of investments with a minimum of \$50M

PatientNow | *Finance & Accounting Intern* | May 2022 – August 2022 | Phoenix, AZ

- Collaborated with the Finance and Accounting teams
- Assisted with audits and data entry, ensuring accurate financial information
- Gained experience in Salesforce and Oracle preparing client invoices and memos

Walker & Dunlop | *Administrative Intern* | May 2022 – August 2022 | Phoenix, AZ

- Scanned documents, optimized and cleansed data
- Reorganized data through word processing and various filing systems
- Responsible for accuracy and clarity through drafting and proofreading memos, invoices, charts, and tables
- Acted as a liaison to ensure effective communication between employees and clients

Camelback Desert School | *Teaching Assistant* | May 2021 – July 2021 | Phoenix, AZ

- Earned CPR certification and worked alongside main teacher
- Supervised and ensured policies and guidelines were followed in and outside the classroom
- Responsible for preparing daily lessons and taking care of 20 students per day

INTERESTS AND INVOLVEMENT

Finance Cub | August 2022 – Present | Clemson, SC

- Attended networking opportunities, educational activities, and informational sessions

Chi Omega, Psi Kappa Chapter | August 2020 – Present | Clemson, SC

- Attended weekly chapter meetings, philanthropy events including Wings for Wishes and Swishes for Wishes, raising over \$35,000 for the Make a Wish Foundation

National Charity League | 2014 – Present | Scottsdale, AZ

- Elected Treasurer; managed monthly budgets for events, ensured group finances
- Planned and led monthly meetings for 20+ people, attended executive board meetings and arranged fundraising events
- Completed over 130 hours of community service

SKILLS

Proficient in Microsoft Excel, PowerPoint, Outlook, Word, Adobe Acrobat, Adobe Illustrator, and Google Drive applications

Avery Palen

(704) 917-8401 | apalen@clemson.edu | 108 Oakway Dr Seneca, SC 29678

EDUCATION

Clemson University, Wilbur O. and Ann Powers College of Business **Clemson, SC**
Bachelor of Science in Financial Management, Banking and Investments Emphasis December 2023
GPA: 3.74/4.0 **Minor:** Accounting

CERTIFICATIONS AND AWARDS

Securities Industry Essentials

- SIE Exam Passed June 2023

Certificate of Commendation from The United States Marine Corps

- Awarded for exceptional performance of duty March 2018

Truist Leadership Institute

- Emerging Leaders Certification October 2020

Certificate of Achievement

- Level 2: Excel Yellow Belt – McGraw Hill Spring 2022

President's List

- Spring 2020, Fall 2020, Spring 2022

Dean's List

- Spring 2021, Fall 2022

WORK EXPERIENCE

Carolinas Wealth Management

Seneca, SC

Client Service Specialist

June 2023

- Interacted with clients and prospects ensuring their financial needs were being met
- Utilized Salesforce and Microsoft Excel to maintain, update and certify data
- Responsible for submitting event material to compliance

The Park Manufacturing Company

Gastonia, NC

Elevator Technician

December 2019

- Repaired and maintained TV tower, industrial and residential elevators
- Built and programmed new elevator control units

The United States Marine Corps

Camp Lejeune, NC

Corporal of Marines

August 2018

- Taught peers the pros and cons of the new Blended Retirement System, similar to 401K with match, when it became available to federal employees
- Inventoried, budgeted for and ordered various office supplies
- Coordinated with Base Fire Marshal to keep area in compliance as the platoon Safety Officer

S. Micah Parker

smp5@clemsun.edu | (864) 553-3456
www.linkedin.com/in/smparker5

EDUCATION

Clemson University, College of Business
Bachelor of Science in Financial Management
Minor: Accounting, Emphasis: Commercial Banking and Investments

Clemson, SC
May 2024

CFA® Level I Candidate, CFA Institute

May 2024 Exam Date

Enrolled in Adventis' Financial Modeling Certification (FMC®) Program
Includes the Financial Modeling Course, Valuation Module, and Leveraged Buyout Module

WORK EXPERIENCE

Marine Security Guard, *United States Marine Corps*

May 2017 – Apr. 2021

- Managed required training for over 50 Marines in detachment and ensured all were up to date on their training.
- I have led 12 – 15 Marines on a successful semi-annual inspection with minimal discrepancies.
- I served as a tactical advisor and participated in 47 emergency response training exercises that increased operational readiness and security.
- Controlled access into diplomatic building by monitoring security equipment and providing escort for all non-cleared diplomatic personnel.
- Checked identification of persons entering and exiting facility to eliminate unauthorized visitors.
- Served as assistant detachment commander and assumed duties as detachment commander in his absence for regional training events.
- Conducted preparations for annual inspections. Mentored and led Marines in all aspects on and off-duty conduct.
- Certified to be a security guard for U.S. Embassies.

Marine, *United States Marine Corps, Camp Pendleton, CA*

May 2012 – Jun. 2021

- Monitored over \$3,000,000 worth of equipment during numerous training exercises.
- Educated over 50 Marines in standard operating procedures, equipment uses, and planning processes.
- Mentored and trained two team leaders on operating procedures and leadership.
- Developed strong communication and organizational skills through working on group projects.
- Trained in combat warfare using multiple weapons and tactics.
- Organized multi-day training events for six subordinates, resulting in increased job proficiency.
- Disciplined in the use of military-grade radios and applying cryptography.

Warehouse Manager, *Brake World, Greenville, SC*

Mar. 2011 – Apr. 2012

- Managed operations of warehouse, including freight and parcel shipments, returns and transfers.
- Properly loaded, organized, and secured equipment and orders, ensured all items intact.

Receptionist, *Coop's Health & Fitness Greenville, SC*

Sep. 2010 – Feb. 2011

- Operated telephone switchboard to answer and forwards calls, provide information, take messages, and scheduling consultations with personal trainers.
- Marketed and sold membership add-on services and nutritional supplement lines.
- Collected payments, renewed memberships, and resolved billing issues.

ACTIVITIES

Wall Street South Investment Club, *Clemson, SC*
Member of the Executive Board

Fall 2023

Finance Club, *Clemson, SC*

Fall 2023

TOP SECURITY CLEARANCE

Held top secret-level security clearance as a Marine Security Guard for the U.S. Department of State.
Top Secret-level clearance, active (December 2018–present).

COMPUTER SKILLS

Microsoft Word, Excel, PowerPoint, Adobe Acrobat.

HONORS AND PROFESSIONAL ORGANIZATIONS

Navy and Marine Corps Achievement Medal, Mar. 2021; Certificate of Commendation, Nov. 2020.

Joel Pederson

318-547-5004 | jdpeder@clemson.edu | www.linkedin.com/in/joeldpederson

Education

Clemson University, Clemson, South Carolina

May of 2024

Bachelor of Science Financial Management

Minor: Accounting

Emphasis: Real Estate

Organizations: Phi Sigma Kappa, Finance Club, Real Estate Club

Employment Experience

Forum Investment Group, Denver, CO

Summer 2023

Intern – Business Development

- Assisted the business development team and head of business intelligence by facilitating daily responsibilities and routine tasks.
- Attended meetings with the Investment Council to learn about the stages of property negotiations and different development and acquisition transactions.
- Collaborated with other interns on a research project that concentrated on the efficiency of Artificial Intelligence in the workplace.

Camp Bethany, Bethany, LA

Summers 2017, 2018, 2022

Camp Counselor

- Taught and led elementary, middle, and high school aged kids through worship and prayer.
- Collaborated with other counselors to plan lessons and events throughout the week.
- Supervised groups of 30 children at a time, ensuring their safety and compliance to camp policies.

Leadership Experience

Phi Sigma Kappa Fraternity, Athletic Chair

January 2022 - Present

- Planned and organized intramural teams within the fraternity, in addition to coordinating with Clemson Campus Recreation to schedule games and tournaments outside of the organization.
- Collaborated with other chairs and executive members to create and present a presentation for each chapter meeting to keep fellow members informed about upcoming events.

Moorestown High School Special Olympics

January 2018 - June 2020

- Mentored fellow classmates with both physical and intellectual disabilities outside of school.
- Directed drills and facilitated games that demonstrated inclusive behavior and served as a model for great leadership and communication skills.

Michael Pels

Michaelpels24@gmail.com | (423)-645-3605

EDUCATION

Clemson University, Powers College of Business

Expected graduation: May 2024

Bachelor of Science in Financial Management, Emphasis in Commercial Banking

GPA 3.09/4.0

2020–present

WORK EXPERIENCE

Crowe LLP

Valuations Intern

Summer 2023

Atlanta, GA

- Valued financial assets and companies using market valuation methods as well as income methods
- Created narrative reports through research to assist in valuing assets and companies as accurately as possible
- Utilized multiple programs such as Bloomberg, CapitalIQ, Excel and others daily.

Cape Cod Baseball League

Head Retail Intern (Orleans Firebirds)

Summer 2022

Orleans, MA

- Developed and implemented plan for merchandise management and set up for 25+ games throughout the summer
- Supervised six retail sales interns

Chatham Bars Inn

Bartender

Summer 2022

Chatham, MA

- Worked with team of ten people to service more than 300 patrons daily at a Forbes 5 star resort
- Assisted in planning large corporate events and weddings throughout the summer
- One of five out of four hundred employees nominated for the employee of the month in July

LEADERSHIP EXPERIENCE

Treasurer, Kappa Sigma Fraternity

11/2022 – 11/2023

- Budgeted and managed funds for a fraternity of 100+ active members
- Assisted in planning and executing social, rush, philanthropy, and brotherhood events for two semesters
- One of five members of the Executive Committee

Puneet Golani Brother of the Year Award

2023

- Awarded to the active member who displays dedication to the fraternity and demands excellence from his peers

McCallie School Missionary Committee

2017–2020

- Coordinated and worked multiple weekend projects building the surrounding community

Ryan Peroni

27 Hitching Post Rd Lakeville, MA 02347 / (508) 562 1364 / ryanperoni37@gmail.com

EDUCATION

Clemson University Clemson, SC

December 2023

- *GPA:* 3.69/4
- *Degree:* Bachelor of Science in Financial Management; minor in Accounting with emphasis in Commercial Banking and Investments

Boston College High School Boston, MA

May 2019

- *GPA:* 3.6/4

EMPLOYMENT AND EXPERIENCE

Watermark Advisors: Investment Banking Summer Analyst

April 2023 - Current

- Analyzed companies and industries to prepare valuation reports, confidential information memorandums, meeting books, and target and buyer lists, as well as industry and deal market commentary
- Utilized discounted cash flows, guideline trading multiples comparable, and guideline transaction multiples comparable methods of valuation
- Extensive work completed in Excel, PowerPoint, S&P Capital IQ, PitchBook, and GF Data for the preparation and creation of the above items
- Gained understanding of the M&A market, deal types and structures, and the M&A process

Sales and Trading Desk Experience

June – August 2022

- Learned directly from equities traders and sales traders, derivatives sales traders, and equity research analysts
- Introduced to hedging strategies for long short investing using indicators such as RSI and Bollinger Bands, as well as necessity for

Rockland Trust: Bank Teller

August – December 2021

- Balanced a cash drawer daily, along with other machines such as ATMs and coin machines as well as audited them
- Resolved issues with debit cards and customer accounts (fraudulent charges, automatic payments, online banking, etc.)
- Completed transactions for customers such as deposits and withdrawals from their bank accounts

ProGroup: Project Manager

June – August 2021

- Scheduled personnel and equipment, visited job sites to confirm completion, assessed progress and implemented necessary changes
- Managed project budgets to achieve desired profit margins
- Planned ordering/purchasing of materials for projects

SERVICE

S.E.A.L. Foundation

- Support mission to help children with learning disabilities through fundraisers and volunteer work

Harvest Hope Food Pantry

- Helped sort, organize, and distribute food to families in need

New Orleans Service Trip

- Tutored school children, participated in spring cleaning for a church
- Worked with residences of New Orleans' ninth ward to address issues race inequality in the community

CERTIFICATIONS AND ATHLETICS

Bloomberg Market Concepts Certificate

- Self-paced course in economics, equities, fixed income, currencies, and use of Bloomberg terminals

Athletics

- Division one level MCLA lacrosse in college, division one state champion in high school lacrosse; state qualifying wrestler

Angelina D. Perre

• angelinaperre@gmail.com • Chester Springs, PA • (610) 719-7326 • linkedin.com/in/angelina-perre

EDUCATION

Clemson University, Wilbur O. and Ann Powers College of Business. **Clemson, SC**
Bachelor of Science in Financial Management May 2024
Minor in Accounting, Emphasis in Banking and Investments GPA: 3.92/4.0
Honors: President's List Fall 2020-Fall 2022

London School of Economics and Political Science **London, UK**
June - July 2022

WORK EXPERIENCE

JPMorgan Chase & Co. **Wilmington, DE**
Global Finance & Business Management Analyst June 2023 – August 2023

- Conducted internal benchmark analysis for the Amazon CoBrand card, considering 20+ KPI
- Created and presented an executive summary regarding 15 lending options offered by Chase and their external competitors

Spiro Institute for Entrepreneurial Leadership **Clemson, SC**
External Analyst in Residence January 2022 – May 2023

- Maximized results of crowdfunding campaign for Pod Farms, LLC through providing an analysis of their customer demographic
- Researched and presented on 5 grant opportunities available to small businesses pursuing innovative agricultural technology

Internal Analyst in Residence January 2022 – May 2023

- Connected over 1,000 Clemson University students to internships, mentors, and jobs through StartupTree
- Implemented 3 marketing strategies to attract 225 students and 12 mentors to the platform

Academic Success Center **Clemson, SC**
Peer Assisted Learning Leader August 2021 – December 2022

- Fostered independent learning for through leading 3 hours of sessions, hosting 120 students
- Planned inclusive activities for 6 hours per week for Accounting 2010 material

Tutor January 2022 - May 2022

- Held upwards of 250 sessions for Business Calculus I and II content, each lasting 30 minutes
- Facilitated long term learning through encouraging top levels of Bloom's Taxonomy

Henri's Bar @ Braca's Café **Sea Isle City, NJ**
Server May 2021 – August 2022

- Collaborated with hostesses, kitchen staff, and bartenders to ensure customer satisfaction
- Worked 8-12 hour shifts 5 times per week serving 90+ patrons each night

COMMUNITY INVOLVEMENT

Alpha Lambda Delta Honors Society **Clemson, SC**
Treasurer April 2021 – August 2023

- Analyzed and authorized each expense made
- Prepared budget reports and presented these at monthly executive meetings

Wall Street South Investment Club **Clemson, SC**
Active Member August 2022 – Present

- Managed \$100,000 of hypothetical money in a brokerage account
- Applied feedback received on trading securities within my investment portfolio

Zeta Tau Alpha **Clemson, SC**
Active Member August 2021 - Present

- Collected over \$500 for Breast Cancer Awareness and Education
- Volunteered in events to better the community, philanthropy, and sisterhood

Reid E. Perrett

843-822-4020 | rperret@clemson.edu | www.linkedin.com/in/reid-perrett

Education

Clemson University

Bachelor of Science in Financial Management
Minor in Legal Studies; Minor in Accounting
Emphasis in Corporate Finance

May 2024
GPA: 3.70/4.00
Dean's List

Work Experience

LPL Financial

Retirement Partners Intern

June 2022-August 2023
Fort Mill, SC

- Led in creation of new financial system to assist in mergers and transition of new advisors
- Participated in a firm-wide marketing internship capstone project and was selected as the winning team
- Utilized 5+ different systems to keep track of financial data behind various retirement plans
- Chosen from 120 interns to aid in creating and speaking in the University Relations promotional video

Academic Success Center

Business Calculus Tutor

August- December 2021
Clemson, SC

- Tutored multiple Business Calculus courses (MATH 1020, 2070)
- Provided educational aid regarding financial calculations and equations 4+ hours a week
- Additionally held sessions outside of traditional hours in order to help more students
- Met with 8+ students throughout the week to provide assistance

Involvement

Delta Sigma Pi Professional Business Fraternity

Vice President of Pledge Education; Collegiate Member

February 2022-Present
Clemson, SC

- Orchestrated a 5 week long professional development process which included resume, cover letter, and LinkedIn workshops
- Mentored 25+ students for 5 weeks and educated the new fraternity members on business etiquette
- Served on the financial committee and orchestrated communal fundraising event

Zeta Tau Alpha

Fundraising Treasurer

August 2021-August 2022
Clemson, SC

- Serving as the Fundraising Treasurer, utilizing Excel in order to track and manage more than \$150,000 raised by the chapter
- Participating in service projects promoting safety, education, and inclusivity in order to give back to the community
- Creating multiple websites for various philanthropy events to efficiently accept and track funds

Women In Business

Active Member

January 2021-Present
Clemson, SC

- Striving towards furthering women's knowledge on professional success
- Attending 4 or more speakers in various business positions advocate for female involvement and share their personal stories
- Networking with fellow female business majors

Skills

Proficient in: Microsoft Excel, Adobe Acrobat, Canva, Google Sheets, Visio

Bryce Peterson

Email: brycewpeterson@yahoo.com Cell: 856-685-3455 Address: 1 Baltusrol Ter, Moorestown NJ 08057

Education

Clemson University

(May '24)

- Bachelor of Science in Financial Management
- Emphasis: Banking and Investments
- 3.3/4.0 GPA

Experience

Ballast Financial

(Summer 2023)

Intern in Financial Planning

- Evaluated and adjusted portfolios based on prebuilt models by the firm
- Reviewed new and returning clients' assets and current financial situation
- Used statistical analysis to project returns on fixed income securities

Spiro Institute for Entrepreneurial Leadership

(August 2023-)

Analyst in Residence

- Used accounting information to project future returns on new projects
- Negotiated with merchandise suppliers to cut brand costs
- Assisted in development of a newly branded website

Academic Success Center

(January 2023-May 2023)

Peer Assisted Learning (PAL) Leader

- Planned lessons for calculus students to review concepts and prepare for exams
- Cultivated an upbeat and positive classroom environment while maintaining professionalism
- Took part in learning and teaching seminars to further ability to communicate with students

Relevant Information

- Clubs: Distributive Education Clubs of America (DECA), Wall Street South, Clemson Build
- Experience using Bloomberg terminals to construct and evaluate a portfolio
- Experience using data analysis and pivot tables in Excel

Townshend Phelps

Townshp@clemson.edu | cell: (404) 615-5844 | www.linkedin.com/in/townshend-phelps

EDUCATION

Clemson University, Wilbur O. and Ann Powers College of Business, Clemson, SC

May 2024

- Bachelor of Science in **Financial Management**
- Emphasis in **Financial Planning**
- Minor in **Psychology**

GPA: 3.40/4.00

INTERNSHIP

Keyence Corporation of America, Chicago, IL

Summer 2023

Sales intern

- Shadowed company sales representatives to learn about the direct sales process
- Made nearly 3,000 phone calls to potential customers to generate roughly 90 leads on technical products for company sales representatives
- Worked alongside a team of 20 other interns

WORK EXPERIENCE

Mellow Mushroom, Clemson, SC

Summer 2022

Server

- Waited on tables, providing superb friendly and engaging customer service

Batteries Plus, Atlanta, GA

Summer 2021

Sales Floor Associate and Trusted Advisor

- Engaged with customers to solve their needs with any type of battery from AAA to automobile batteries, including the installation of auto batteries. Job required extensive training and knowledge of all battery types and home lighting
- Led all employees of a three-location franchisee with 20 employees as the top commissioned salesperson every week employed

The Home Depot, Marietta, GA

Summer 2020

Lot Associate

- Provided excellent customer service by helping customers load purchases into their vehicles
- Maintained front store appearance by returning carts to store and keeping parking lot clean

Sweetwater Pools - Summer Lifeguard

Summer 2019

LEADERSHIP AND INVOLVEMENT

Chi Psi Fraternity, Alpha Chi Delta Chapter, Clemson, SC

2021-2023

Vice President External

- Lead the growth of the fraternity via oversight of the Recruitment Chairs, Social Chairs, Philanthropy Chairs, and all campus initiatives
- Managed and advance the fraternity's image with the Interfraternity Council
- Actively engage with fraternity alumni at all alumni events

Recruitment Chair

- Oversaw recruitment process of potential new members in the Fall 2022 semester
- Personally developed and implemented new strategies which increased student interest by 400% leading to an 87.5% increase in pledges, resulting in the largest pledge class in 15 years
- Led and delegated tasks to the Recruitment Committee of 8 brothers

SKILLS

Communication | Leadership | Teamwork | Initiative | Outspoken | Engaged | Curious
| Adaptable | Coachable | Diligent | Sales |

John Luke Pignetti
jlpigne@clemson.edu (404) 536-0955

EDUCATION

Clemson University May 2024 (Expected Graduation)
Bachelor of Science in Financial Management; Emphasis in Real Estate Dean's List Recipient 3x
Accounting Minor

PROFESSIONAL EXPERIENCE

Leasing Consultant Intern Atlanta, GA
Provence Real Estate May – July 2023

- Traveled throughout the Southeast to different properties
- Answered phone calls and directed apartment unit tours
- Previewed apartment complex acquisitions
- Performed marketing audits and shopped competition apartments
- Tracked and filed capital expenses in Excel

Outside Operations/Caddy Atlanta, GA
East Lake Golf Club May 2021 - August 2023

- Provided valet services to members and guest of East Lake
- Assisted with range and course maintenance
- Cleaned clubs and prepared anything necessary for member departure

Caddy Athens, GA
Cherokee Town and Country Club May 2019 - August 2019

- Assisted members and guests of Cherokee Town and Country Club

Athletics Assistant/Scorekeeper/Referee Atlanta, GA
Cathedral of Christ the King January 2015- 2020

- Organized and coordinated church league basketball games
- Helped manage the scorer's table during games
- Refereed girls' Volleyball

VOULENTEER EXPERIENCE

St Pius X & Mustard Seed Communities Mission Trip to Kingston Jamaica April 2019
• 1 of 18 students selected out of 500+ applicants through rigorous application and interview process
• Personally raised over \$1000.00, rebuilt community playground, transported food deliveries, installed protective measures for local fish farm, fed physically and mentally impaired children, and cleaned & maintained housing quarters daily

200+ Community Service Hours August 2016 - May 2022
• Atlanta Food Bank
• Salvation Army
• Cathedral of Christ the King

CAMPUS & COMMUNITY INVOLVEMENT

Beta Theta Pi Member August 2020 - Present
Wallstreet South Investment Club August 2022 - Present
Beta Theta Pi Scholarship Chairman November 2021 – November 2022

PATRICK W. PIXLEY

Phone: (916) 640-3205

Email: ppixley@clemson.edu

[linkedin.com/in/patrick-pixley-652087226](https://www.linkedin.com/in/patrick-pixley-652087226)

EDUCATION

Bachelor of Science in Financial Management and Minor in Accounting

Clemson University, Clemson, SC

May 2024

GPA: 3.65/4.0

Relevant Coursework: Intermediate Accounting 1 and 2, Financial Management 1 and 2, Cost Accounting, Investment Analysis, Analytics for Accounting Decision Making, Derivative Analysis, Tax, and Spreadsheet Applications in Finance

Honors & Awards: President & Dean's List and Order of Omega Leadership Award

Extracurricular Activities: Finance Club, Interfraternity Council Vice President of Risk Management, Alpha Tau Omega Fraternity Executive Board Member, and ClemsonLIFE Volunteer

EXPERIENCE

Pricing Intern at Berry Global, Inc, Charlotte, NC – Plastic Manufacturing

May 2023 - August 2023

- Collaborating with peers from different departments to develop intuitive product mapping to simplify a complex pricing system, facilitating efficient onboarding and enhancing the comprehension of the existing team members.
- Developing customized audit procedures for various distributors of Berry Products, optimizing the accuracy of financial assessments.
- Used self-constructed audit tools to discover and rectify over \$20,000 in owed funds to Berry Global in the month of June.

Intern at RDK & Associates, Inc, Tulsa, OK – Bank Consulting Firm

June 2022 - August 2022

- Navigated the field of BSA/AML compliance, exhibiting expertise in ensuring regulatory adherence and mitigating financial risks.
- Conducted thorough loan reviews to assess credit quality and adherence to lending policies.
- Demonstrated adeptness in appraisal management, coordinating and overseeing the valuation process to ensure accurate and reliable property assessments.

Technician at Dr. Robert H. Zoellner & Associates, Tulsa, OK - Optometrist

May 2021 - August 2021

- Performed comprehensive patient pre-testing, including proficiently utilizing the phoropter, conducting eye pressure tests, and administering accurate eye chart examinations.
- Demonstrated strong organizational skills and excellent customer service by effectively managing front desk operations, promptly attending to phone calls, and efficiently checking patients in.

Intern at Tulsa Regional Chamber - Sports Commission, Tulsa, OK

January 2020 - February 2020

- Conducted thorough research to curate player gifts and ensured seamless setup of mats for the prestigious Big 12 Wrestling Championship.
- Drove local business engagement by distributing impactful marketing pamphlets to Tulsa establishments.
- Efficiently coordinated information booths and managed logistics for diverse conventions, ensuring a smooth and engaging experience for attendees.

Intern at Mabrey Bank, Tulsa, OK

January 2019 - February 2019

- Enhanced operational efficiency by providing valuable support to bank tellers.
- Created portfolios for consumer real estate transactions.
- Developed Excel Spreadsheets for organizing and tracking client information.

EDUCATION & HONORS

Clemson University, Wilbur O. and Ann Powers College of Business | Clemson, SC

Bachelor of Science in Financial Management; GPA: 3.7/4.0

Expected Graduation: May 2024

Minor: Accounting, Emphasis: Banking and Investments

- Dean's List: Spring 2021, Fall 2021, Spring 2022, Fall 2022
- President's List: Fall 2020

Relevant Coursework

- Intermediate Financial Accounting, Contemporary Financial Management, Entrepreneurial Mindset, Spreadsheet Applications in Finance, Financial Institutions and Markets, Investment Analysis

The Episcopal Academy | Newtown Square, PA

September 2006 – May 2020

- GPA: 3.75/4.0

WORK EXPERIENCE

Grant Thornton LLP | Philadelphia, PA

June – August 2023

Finance Transformation Advisory Intern

- Served insurance clients in financial integration, data management, cost-cutting, revenue growth.
- Leveraged Alteryx to assist in creating automation workflows that optimize large datasets for the client's organization and utilization.
- Performed reconciliations in Excel for confirmation of successful and efficient workflows.

Crumdale Partners | Radnor, PA

May – August 2022

Summer Analyst

- Analyzed and interpreted data sets relevant to market trends based on geographic locations, presented findings.
- Processed and condensed contact information, data, and opportunities in Salesforce.
- Researched potential broker contacts in effort to increase market penetration in certain regions.
- Assisted leadership team in start-up of incentive override program for select partners.

Excel Sports Camp at Episcopal Academy | Newtown Square, PA

June – August 2021

Camp Counselor

- Supervised and guided the campers while participating in activities.
- Provided an enjoyable experience through planning and leading sports camp activities.

ACTIVITIES & LEADERSHIP

Clemson Consulting Club | Clemson, SC

September 2023 – Present

Member

- Participated in information sessions, seminars, networking events related to consulting.

Kappa Sigma Fraternity | Clemson, SC

January 2023 – Present

Alumni Chairman

- Organized events, wrote newsletters, and maintained relationships with chapter alumni.

Wall Street South Investment Club | Clemson, SC

September 2022 – Present

Member

- Participated in a global portfolio simulation competition through the comprehensive trading of securities and portfolio management.

SKILLS

- Microsoft Office, Salesforce, Alteryx Core Certified

Katie Pritchard

120 Elm Street, Unit 1 • Clemson, SC 29631 • kmpritch@g.clemson.edu • (828) 333-1965

EDUCATION

Clemson University, College of Business

Bachelor of Science in Financial Management

Minors in Art and Accounting, Emphasis in Financial Planning

Cumulative GPA 3.52/4.0

Clemson, SC

May 2024

STUDY ABROAD

Art in Italy

Rome, Orvieto, Florence and Venice

Summer 2022

- Studied significant historical and contemporary artwork through the form of on-site drawing and journaling with faculty directed instruction.
- Expanded understanding of the art making process as well as the significance of the work culturally, formally, and technically.
- Immersion into the Italian culture by engaging in the art and history of each unique city.

WORK EXPERIENCE

KMAC Contemporary Art Museum

Intern and Special Projects Coordinator

Louisville, KY

June 2023- Present

- Led implementation, launch and ongoing enhancement of Bloomberg Connects digital experience.
- Developed multiple marketing initiatives to broaden community partnerships.
- Engaged with visitors to enrich their overall experience through introduction to, and education about, our current exhibitions.
- Shadowed museum administration on all aspects of non-profit management.

LEADERSHIP AND SERVICE

Kappa Kappa Gamma Sorority

Intramural Chair and Finance Committee

Clemson, SC

August 2020- Present

- Led and organized chapter participation within university league sports.
- Assisted in guiding all aspects of chapter finances.

Scholars of Finance

Vice President of Marketing and Outreach

Clemson, SC

October 2022- Present

- Recruit and onboard high-performing and high-integrity student members.
- Utilize external communication and social media platforms to drive recognition.
- Engage with the Scholars of Finance national network and Leadership Teams.
- Facilitated our chapter's first Leadership Development Program.

Ryan S. Rattay
114 Lazarus Drive, Ledgewood, NJ
rattayryan14@gmail.com | (862) 324-0249

Education

Clemson University, The Wilbur O. and Ann Powers College of Business

Clemson, SC

Bachelor of Science in Financial Management

May 2024

Minor: Accounting; Emphasis: Financial Planning Services

Cumulative GPA: 3.04 / 4.00

- **Relevant Coursework:** Portfolio Management and Theory, Business Statistics I and II, Financial Management I and II, Financial Accounting I and II, Tax Accounting I and II, Investment Analysis, Risk and Insurance, Principles of Macro and Microeconomics

Professional Experience

Zoetis, Inc.

Parsippany, NJ

US Business Intelligence Division

June 2023 – August 2023

- Switched divisions at Zoetis to gain more career specific knowledge and work experience
- Assisted in financial models, business unit and product specific forecasting, while taking on a project to remodel the main forecasting dashboard (in Excel) that is used throughout the US portion of Zoetis
- Gained more experience using Excel and forecasting techniques to build assumptions into financial figures

Zoetis, Inc.

Parsippany, NJ

US Commercial Finance Division

May 2022 – August 2022

- Intern at Fortune 500 company, the world's largest animal health company with \$8 billion in annual revenue
- Collaborated on projects working across platforms both internal and external including the fundamental programs: Excel, Essbase, Anaplan and SAP
- Assisted in quarter closes, forecasting, and the operating plan, while conducting market and competitor research

Baltusrol Golf Club

Springfield, NJ

Summer Intern

May 2021 – August 2021

- Golf club that has hosted seven U.S. Opens and two PGA championships that prides itself on best-in-class service
- Assisted members with all aspects of golf and country club experience including organizing multiple events

Activities/Skills/Awards

Activities

Clemson Wall Street South Club: Faculty-led group that promotes hands-on experience trading securities and managing a portfolio of \$100,000

Clemson Finance Club: Participated in regular, faculty-led, discussion and projects about current financial situations

Clemson Real Estate Club: Facilitates real-world market experience through speakers and networking in a changing market

Clemson Jiu Jitsu: Attended classes daily with a team to develop skills for competition

Phi Delta Theta Fraternity: Held leadership position focusing on improving and maintaining the chapter house

Skills

Bloomberg (Bloomberg Market Concepts certification # qxJeyAPiPNNP839GjAiDSVBB), AI for Business, Excel, PowerPoint, Word, ANAPLAN, SAP, Essbase

Business Analytics, Strategic Planning, Public Speaking, Business Development

Community Contributions

Charity: Participated in miscellaneous charity events such as setting up events in my hometown through the National Honors Society and Interact Club, and events to raise money for ALS in New Jersey and South Carolina

Coaching: Assisted coaching in youth football and lacrosse

Awards: All-Conference, NJ, RISK lacrosse; All-Conference, NJ, NJAC lacrosse

Sean Rea

1 Holly Avenue, Farmingdale, NY 11735 | swrea@clermson.edu | 516-780-4732

Education

Clemson University, College of Business
Bachelor of Science in Financial Management
Minor: Accounting, Emphasis: Real Estate

Clemson, SC
December 2023

- Cumulative GPA: 3.45/4.0
- Awards: Dean's List Fall 2021, Fall 2022, & Spring 2023

Work Experience

First National Bank Long Island

Melville, NY

Credit Analyst Intern

Summer 2023

- Prepared financial statements and spreadsheets to support the analysis of a Borrower's credit risk
- Conducted due diligence searches on businesses seeking funds and guarantors of the credit facilities
- Communicated and gathered information from external sources including credit reporting agencies
- Completed underwriting on four credit requests to be submitted to upper management for approval, including the purchase of a 54-unit multi-family building
- Assigned risk ratings on the feasibility of credit requests based on factors such as the businesses financial performance and debt service coverage ratios under stress tests

New York State Parks, Recreation & Historic Preservation

Bethpage, NY

Ranger

May 2022-August 2022

- Supervised golfer conduct and helped maintain a level pace of play over five 18-hole golf courses daily
- Helped prepare course for golf outings by arranging golf carts and distributing scorecards
- Settled disputes between golfers relating to slow play issues

Driving Range Attendant

May 2021-August 2021

- Fulfilled customer orders and distributed receipts to be used by the customers to obtain range balls
- Operated range ball picker and was responsible for fueling the vehicle
- Managed cash payments and closed out the cash register at the end of each shift

Campus Involvement

Clemson Surf Club

Clemson, SC

Finance Team Member

Fall 2022-Present

- Created excel spreadsheets to keep track of inflows and outflows of club related funds
- Directed finance team meetings discussing club expansion possibilities, including generating ideas for fundraising events and sponsorship opportunities
- Assisted in the allocation of club's Venmo and PayPal account balances between social events and surfing excursions

Wall Street South Investment Club

Fall 2022-Present

- Responsible for managing a \$100,000 global stock portfolio simulation
- Gained valuable experience trading stocks, bonds, mutual funds, options, futures, and international stocks

Certifications

- CoStar Real Estate Analytics (CREA), *CoStar Group* – April 2023

Samuel Reeson

Clemson, SC | 908-868-1220 | sam.reeson@gmail.com | [LinkedIn](#)

Objective

Motivated and results-driven student seeking a challenging entry-level position in the financial services industry. Committed to utilizing academic knowledge, interpersonal skills, and internship experience to contribute to the success and growth of a reputable financial institution.

Education

Clemson University **Clemson, SC**
Bachelor of Science in Financial Management May 2024
Minor: Accounting, Emphasis: Corporate Finance

Work Experience

Wells Fargo **Clemson, SC**
Summer Intern May 2023 - Present

- Strengthened Wells Fargo's presence on campus by proactively cultivating relationships with parents and students
- Enhanced efficiency in the debit card set-up process by accurately transcribing customer data into the computer system
- Identified key trends during student orientation and implemented effective strategies resulting in increased enrollment
- Improved banking skills and knowledge through active observation and participation while shadowing bankers

The Cranford Social **Cranford, NJ**
Special Event Server November 2018 - February 2020

- Organized banquet hall setup efficiently, ensuring a seamless guest experience during events
- Provided exceptional customer service to guests by promptly delivering gourmet food from the kitchen to the banquet hall
- Played a crucial role in post-event cleanup and teardown, contributing to a smooth event execution

River & Rail Cantina **Cranford, NJ**
Busser June 2018 - February 2020

- Trained and mentored a team of 10+ employees, ensuring they followed best practices and procedures, resulting in improved restaurant operations
- Maintained a clean and pleasant dining experience for customers by efficiently clearing, sanitizing, and resetting tables
- Implemented effective stock-management practices to ensure the restaurant was always well-stocked, leading to increased customer satisfaction and repeat business

Campus Involvement

Real Estate Club **Clemson, SC**
Member January 2023 - Present

- Actively engaged in informative events, workshops, and networking opportunities, expanding knowledge and understanding of the commercial real estate industry

Wall Street South Investment Club **Clemson, SC**
Member August 2022 - Present

- Demonstrated expertise in investment management by achieving top 20% rankings in competitive portfolios through strategic trading and asset management within a simulated brokerage account

Intramural Sports **Clemson, SC**
Member August 2021 - Present

- Collaborated with teammates to enhance team performance and efficiency while participating in various sports affiliated with Clemson Campus Recreation

Skills/Interests

Skills: Microsoft Office, Tableau, POS system, Conversational Spanish

Interests: Baseball, Football, Golf, Surfing, Personal Fitness, Travel

Alan Rizkalla

arizkal@g.clemson.edu | 703-341-7895 | Oakton, VA|

EDUCATION

Clemson University – Clemson, SC
Bachelor of Science in Financial Management
Minor: Accounting, Emphasis on Real Estate
PROFESSIONAL EXPERIENCE

December 2023

Bloomberg Industry Group

June 2023 – August 2023

Sales Associate – Law Firms, Intern

- Contributed to the success of the company's top-performing sales representatives in law firm channels by developing new business opportunities generating over \$130K in opportunities
- Established and cultivated relationships with clients and prospects through cold outreach – including calling, emailing and LinkedIn Sales Navigator.
- Collaborated closely with relationship partners to develop account-specific strategies to identify strategic growth opportunities.
- Participated in client meetings and industry events to develop a further understanding of sales process and legal industry.

Tiger Town Movers, LLC

May 2022- Present

Co-founder - Business Manager

- Identified a gap in moving services, located in the surrounding Clemson area, servicing college students reallocating to and from the University.
- Responsible for ~30K in revenue in six months.
- Conducted market research to identify the most appropriate approach to addressing this gap; considerations included legal framework, hiring, and ease of service.
- Designed marketing materials to aid with customer acquisition including website, logos, and promotional items.
- Actively manage client inquiries, scheduling, and negotiations with independent contractors.

pxROBOS NFT

July 2021-Present

Founder- Project Lead

- Planned, executed, and directed a team of Web 3.0 developers in launching an NFT project on the Solano blockchain that has amassed over \$300,000 in sales volume.
- Established a token that gave holders voting and governance rights to help dictate future launches and active initiatives, our first 2,222 NFTs sold out in under three hours.
- Negotiated contracts with developers to introduce smart contracts to facilitate transactions and ensure a fair marketplace for our holders.
- Designed and built a mainframe for our website that integrated Robos utility with tangible merchandise to help grow brand exposure.
- Managed a team of twelve individuals with varying roles and responsibilities from all over the world, coordinating meeting schedules, tasks, and most importantly ensuring a successful timely launch.

LEADERSHIP & PROFESSIONAL DEVELOPMENT

Delta Chi Fraternity Alumni Chair | Investment Research Club | Wall Street South Investment Club | Clemson Real Estate Club | Minority Business Student Association | Athletic Advisor Council President

SKILLS & CERTIFICATIONS

Skills: Stakeholder Management | Organization | Attention to Detail | Project Management | Customer Service | Client Management | Financial Acumen | Market Research

Tools: Salesforce | Microsoft Office Suite | ZoomInfo | LinkedIn Sales Navigator | NetSuite | Bloomberg Law | iMovie | Customer Relationship Management Systems | Point of Sale Systems | Co-Star Certification

Languages: Fluent English. Conversational proficiency in Arabic.

COREY ROACH

<https://www.linkedin.com/in/corey-roach-3385a8188/>
443-280-2691,
coreyroach03@gmail.com

EDUCATION

Clemson University, Wilbur O. & Ann Powers College of Business
Bachelor of Science in Financial Management & Accounting Minor

Anticipated Graduation: May 2024
Cumulative GPA: 3.83/4.00

EMPLOYMENT HISTORY

T. Rowe Price

Baltimore, MD

Global Equity Trading Intern

June 2023 – Present

- Developed an R coding tool to discover portfolio overlap in 50+ different equity funds amongst the master portfolios and clone accounts in order to improve analysis for allocating assets.
- Created an excel tool that pulled the 21-day exponential moving average on securities and created a trigger warning for portfolio manager if the price were above that threshold.
- Trained and collaborated in the Investment Fellow classes where the following skills were taught and refined: investment science, econometrics, quantitative reasoning, SQL, R coding, and advanced statistics.

T. Rowe Price

Baltimore, MD

Global Investment Operations Intern

June 2022 – August 2022

- Performed global project management activities for 4 different asset classes and 2 operational strategies amongst the Investment Liaisons to facilitate the creation of a website and workflows in order to improve processes.
- Analyzed and reported significant portfolio cash flows to make sure firm is following Global Investment Performance Standards.
- Utilized data visualization tools and programming languages, including VBA, to increase automation, improve efficiency, and reduce risk.

Roto-Rooter Plumbing & Drain Service

Linthicum Heights, MD

Business Operations Intern

May 2021 – August 2021

- Analyzed and prepared complex profit and loss statements as well as audit information to provide accurate and timely financial recommendations to executives.
- Constructed advanced Excel prototypes to display if goals were accomplished across the Northeast Region.
- Scanned, prepared, organized, and distributed leasing information for 25+ locations.

LEADERSHIP EXPERIENCE & INVOLVEMENT

Clemson University Investment Research Club

Clemson, SC

President

September 2021 – Present

- Managed group of 30 analysts on proper investment research, interview, and networking techniques.
- Performed extensive market research on company fundamentals including revenue streams, profitability, ratios, management, product, outlook, etc.

Clemson University Investment Banking Club

Clemson, SC

Investment Banking Analyst

February 2022 – May 2023

- Enrolled in Adventis' Financial Modeling Certification Program which includes learning about discounted cash flows, public comparables, financial forecasting and valuation models.
- Learned to be proficient in designing and manipulating Excel spreadsheets with minimal mouse usage, utilizing advanced keyboard shortcuts and Excel formulas to streamline data entry and analysis.

AWARDS & SKILLS

Awards: Clemson University Presidents List Fall and Spring of Sophomore Year & Dean's List Fall and Spring of Junior Year, First Place in both Entrepreneurship & Management Decision Making FBLA State Competition

Skills: Financial Modeling, Financial Accounting, Quantitative Analysis, Market/Economic Analysis, Analyzing Financial Statements, Econometrics, R Coding, Advanced in Excel, Networking, Presentation/Communication Skills

Noe Rocha

Nrocha2729@gmail.com | (864)376-4173 | Greenville, SC 29617

EDUCATION

- Clemson University, College of Business. **Clemson, SC**
December 2023
 - *Bachelor of Science in Financial Management*
 - *Minor: Accounting, Emphasis: Corporate Finance*

WORK EXPERIENCE

MC Finanzas – **Barcelona, Spain**
Analyst Intern Summer 2023

- Researched and pursued leads in order to bring in clients.
- Financial Tasks related to the interest of the clients.
- Support the statistics department in all their tasks.

Green Bridge Construction. **Greenville, SC**
Self-Employed/CO-Founder April 2022 to Current

- Lead Project Manager in handling negotiations, expenses, and marketing.
- Responsible for finding clientele and offering services such as lawn care, house renovations, and small construction projects.
- Equipment handling and responsible for setting up contracts with customers.

90+ Overtime **Greenville, SC**
Project Manager January 2021 to May 2023

- Business Management- Assisting with financial planning and assessing expenses.
- Creating an introductory financial plan for day-to-day expenses using QuickBooks.
- Social media marketing on platforms such as Instagram and Facebook (taking pictures, scheduling, and editing posts).
- Seasonal Coaching -Helping lead groups and individual sessions.
- Attending conference meetings to discuss and resolve issues within the business.

Rent-A-Wheel. **Greenville, SC**
Account Representative May 2020 to October 2020

- Oversaw collecting payments and ensured payment plans were on track.
- Assisted customers with account payments and answered questions or concerns.
- Addressed customer service-related questions regarding payments, policies, or general questions.

Copa Indoor Soccer. **Greenville, SC**
Sports Coordinator January 2018 to May 2020

- Greeted customers and assisted them with any needs or questions.
- Supervised facility during events such as leagues, rentals, or soccer camps.
- Handled front desk interaction, received payments, and answered phone calls.

SKILLS

- Microsoft Office (Word, Excel, and PowerPoint)
- Fluent in English and Spanish
- Bloomberg Certified

ORGANIZATIONS

- Wall Street South Investment Club
- Association of Latino Professionals for America

Nicolas Rosso

Clemson, SC 29630 | 331-457-2451 | nrosso@clemson.edu

Currently attending Clemson University pursuing a Bachelor of Science in Financial Management with a Minor in Accounting and additional coursework in global leadership and negotiations. Dedicated to exceptional academic performance and learning more through study abroad opportunities and meaningful work experience.

Education

Clemson University | Cumulative GPA: 4.0/4.0 | Graduation Date: May 2024

- Bachelor of Science, Financial Management
- Emphasis: Banking and Investments
- Minor: Accounting

University of Oxford, Magdalen College, United Kingdom | Jun – Aug 2022

Faculty-Directed: Clemson Business in Europe: Oxford Program

Activities and societies: Global Leadership Lessons taught by Clemson College of Business Dean Wendy York | Legal Environment of Business taught by Attorney Judson Jahn, a Senior Lecturer of Legal Studies and Taxation at Clemson, and the founder of the Dean's Global Leadership Program.

Skills

Superior work ethic • Highly organized and disciplined • Excellent written and verbal communication skills • Strong content development skills • Ability to work collaboratively in teams or independently • Analytical Thinker • Ability to learn new skills / concepts quickly • Strong technical skills, proficient in Microsoft, Google, and other productivity applications • Exposure to NetSuite and PeopleSoft enterprise financial system platforms; and various business intelligence and analytics applications including Tableau • Risk and compliance processes and procedures.

Experience

Intern | Accounting & Finance | Freddie Mac | May – Aug 2023 | McLean, Virginia

- Assist with validation to ensure accurate financial disclosures.
- Support accounting activities related to producing accurate GAAP financial statements.
- Prepare financial reports about business performance for internal management.
- Work collaboratively with internal and external partners representing various groups across the organization.

Intern | League of Women Voters | Aug 2019 – Apr 2020 | Greenville, South Carolina

Assisted with website development and social media management • Participated in Board of Director meetings • Developed a process for recording and streaming meetings • Met with directors and committee chairs to learn about goals and the work required to lead a team • Developed a recruitment plan for students • Consulted on communication strategies for high school and college members.

Honors and Awards

- **Clemson University President's List – ALL SEMESTERS, Aug '20 to May '23**
Granted to students each semester who achieve a minimum 4.0-grade point average.
- **The Honor Society of Phi Kappa Phi**
Elected to the Clemson chapter of The Honor Society of Phi Kappa Phi. Top 7.5% of second term juniors.
- **AFS Global Competence Certificate**
Issued by AFS Intercultural Programs - Aug 2022
Successfully completed the AFS Global Competence Certificate, an educational program that explores intercultural theories and models through active experimentation in a new cultural environment and deep reflection with a facilitator. Successful completion reflects the knowledge, skills, and understanding needed to interact effectively in a global and cross-cultural environment.

(Caroline) Sloan Rost

404 Hidden Spring Lane, Pittsburgh PA 15238 | 412.888.9603 | csloanrost@gmail.com

EDUCATION

Clemson University Clemson, SC
Bachelor of Science in Financial Management *August 2020 – May 2024*

- Minor: Accounting, Emphasis: Corporate Finance
- GPA: 3.96/4.00
- Accomplishments and Other Activities: President's List, Dean's List, Investment Banking Club, Finance Club, Women in Business, Active Minds

Lorenzo de' Medici - The Italian International Institute Florence, Italy
Clemson University Study Abroad Student *Jan 2023 – May 2023*

WORK EXPERIENCE

Bank of America New York, NY
Investment Banking Summer Analyst *June 2023 - August 2023*

- Provided strategic advising services, specifically raising capital through debt and equity offerings (IPO, bonds, loans) and executed transactions (M&A) within Technology, Media, and Telecom (TMT) group

Bank of America New York, NY
Investment Banking Sophomore Summer Analyst *June 2022 - August 2022*

- Provided strategic advising services, specifically raising capital through debt and equity offerings (IPO, bonds, loans) and executed transactions (M&A) within Technology, Media, and Telecom (TMT) group

Clemson University Academic Success Center Clemson, SC
Calculus Peer-Assisted Learning (PAL) Leader *December 2021 - May 2022*

- Supported 130+ students in their secondary business calculus class
- Planned and facilitated learning sessions twice a week to review and practice material with students
- Acted as an intermediary between professors and students by updating professors on student's progress

LEADERSHIP

College of Business Finance Student Advisory Board Clemson, SC
Member *May 2022 – Present*

- Selected to serve as 1 of 13 students who represent the Financial Management Department within the College of Business
- Provide professional development opportunities through coordination of interview workshops and employer speaker events
- Advise and inform first-semester business students of career paths within finance industry

Women's Club Lacrosse Team Clemson, SC
Treasurer *May 2023 – Present*

- Budget player dues and additional funding from the university
- Allocate funds to the league (SWLL Division 1), tournaments, apparel, travel weekends and more

Kappa Kappa Gamma Sorority Clemson, SC
Executive Board *December 2020 – May 2022*

- Served as a liaison between 11 other sororities of the Panhellenic Community, the chapter, and advisors
- Collaborated in weekly meetings with fellow board members to plan interfraternal philanthropic events

ADDITIONAL EXPERIENCE

Goldman Sachs, Women's Possibilities Summit *January 2022 – April 2022*
KKR, Undergraduate Diversity Insights *January 2022*
Morgan Stanley, Student Ambassador Series *October 2021 - November 2021*
Goldman Sachs, Summer Insight Series *May 2021 - July 2022*

Robert H. Roth

3 Nearwater Ln. Riverside, CT 06878 | (203) 517-8417 (cell) | robert.roth2002@gmail.com | www.linkedin.com/in/robert-h-roth

EDUCATION

Clemson University: Wilbur O. and Ann Powers College of Business
Bachelor of Science in Financial Management, Emphasis in Real Estate
Minor: Accounting

Clemson, SC
May 2024

WORK EXPERIENCE

Commercial Banking Summer Intern
United Bank

Washington, DC
Summer 2023

- Worked at a commercial bank with over 30B in Assets Under Management at their primary office (D.C.)
- Rotational internship program included Retail Banking, Commercial Lending, Wealth Management, Operations, and Commercial Credit
- Personally met and connected with over 100 banking professionals throughout all facets of the bank
- Presented both individually and in a group setting to banking professionals from Credit Analysts to the Chief Executive Officer of the Bank
- Performed Commercial Real Estate Loan Underwriting and presented Loan Decision to a mock loan committee
- Presented on a proposed term sheet to Commercial Lenders and Portfolio Managers
- Was selected to shadow the Commercial Lenders and the Portfolio Managers at the K Street office the last week of the internship

Real Estate Summer Intern
Roth Equities

Greenwich, CT
Summers 2019-2022

- Interned in an investment real estate office for four summers
- Visited and inspected apartment, self-storage, industrial and retail investment properties throughout the state of Connecticut
- Assisted in preparing Financing Memorandums
- Performed various tasks using Microsoft Excel, Word, and PowerPoint

Head Safety Instructor

American Red Cross Greater NY

Greenwich, CT
Summer 2022

- Served as a main instructor at the American Red Cross, Safety Town Program
- Responsible for a new group of 30 students every week
- Collaborated with the Greenwich Police Department, Fire Department, and Emergency Medical Services
- Displayed excellent interpersonal skills with parents of students, administrators, and town employees

LEADERSHIP & CAMPUS INVOLVEMENT

Clemson Real Estate Club Executive Committee
Certification Chairman

Clemson, SC
Apr 2023-Current

- Serve on the Executive Committee of a student ran organization with over 200 members
- Facilitate and assist club members to be certified through valuable resources and databases such as Costar, A.CRE, and Bloomberg
- Attend weekly presentations with guest speakers who are successful in various lines of Real Estate
- Connect with and secure guest speakers to speak to the club

Phi Delta Theta Fraternity Executive Committee
Awards Chairman

Clemson, SC
Dec 2021-Dec 2022

- Full Year Position responsible for our chapter of 130 members
- Lead the chapter in all functions through philanthropic efforts, alumni development, and new member education to win campus recognized awards. Awarded by Clemson University
- Meet with our alumni of 53 years to push our initiative to win the Clemson FSL Alumni Development Award
- Chapter was awarded with both the Clemson FSL Alumni Development and Fraternity and Sorority Life Involvement Awards (Spring 2022)

Formal Chairman

Clemson, SC
Dec 2022-May 2023

- Responsible for managing and utilizing a substantial budget of > \$30,000 for the weekend
- Demonstrated proficiency in budget allocation, resource management, and cost
- Conceptualized, planned, and coordinated a fraternity event with 120 attendees spanning an entire weekend in Charleston, SC
- Spearheaded logistics management, including venue selection, transportation arrangements, accommodation bookings, and meal planning

Wall Street South Investment Club
Member

Clemson, SC
Aug 2022-Current

- Participate in a simulated \$100,000 peer investment competition striving for the greatest overall return
- Personal Portfolio Finished Top 25 in the Club
- Attend monthly meetings, guest speakers, and presentations to learn different information within the world of investments, equities, and securities

AWARDS & ACHIEVEMENTS

Clemson University Dean's List
Co-Captain for Greenwich High School Tennis Team
National Honor Society, Greenwich High School
Social Studies Honor Society, Greenwich High School
Attended and watched a game at all 30 current MLB Ballparks

Alexander Rubinstien

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894 Tiger Blvd, Clemson, SC 29631

EDUCATION

Clemson University - Wilbur O. and Ann Powers College of Business
Bachelor of Science in Financial Management; Minor in Accounting
Concentration: Corporate Finance

Clemson, SC
December 2023

- *Financial Management Student Advisory Board* *August 2021 - Present*
 - Worked with Dean and faculty to improve student learning and enhance student experience.
 - *President, Spanish Club* *October 2019 - October 2021*
 - Led team-assisted events across campus for club recruitment and study abroad programs.
 - *Assistant, Clemson Athletic Event Operations* *August 2019 - May 2021*
 - Assisted with the execution of home sporting events, this included setup, breakdown, and distribution of credentials for players and event staff.
-

WORK EXPERIENCE

State Farm

Account Representative

Anderson, SC
January 2023 - Present

- Promoted within 6 months of employment.
- Responsible for establishing and maintaining customer relationships by providing prompt, accurate, and friendly customer service in both Spanish and English.
- Offer inquiry responses regarding insurance availability, eligibility, coverages, policy changes, transfers, claim submissions, and billing clarification.
- Property & Casualty Licensed.

Sales Intern

May 2022 - December 2022

- Worked with agent to establish and meet sales goals by tracking records of new business.
- Marketed appropriate products and services when identifying customer needs.
- Scheduled client focus and policy review appointments.

The Inn at Patrick Square

Hotel Auditor

Clemson, SC
May 2020 - May 2022

- Developed structured reports for cash, check, and credit transactions reflecting financial performance.
- Maintained quality control by balancing ledger accounts and ensuring financial compliance through internal procedures.
- Helped boost annual revenue by \$1.2 million during 2021 by consistently adding clientele and promoting higher-priced accommodations.
- Two-time Employee of the Year Award winner.

Dunkin'

Assistant Manager

Rock Hill, SC
May 2016 - January 2020

- Oversaw 10+ employees and shift leaders, coordinating schedules and assisting with customer service.
 - Administrated corporate emails regarding inventory, sales targets, and marketing material.
 - Maintained a 90% satisfaction rate for 3 years.
-

SKILLS AND INVOLVEMENT

- Spanish Bilingual
- Dean's List Honoree
- Clemson Finance Club
- Microsoft Office
- Tableau
- Power BI
- SAS
- Inbound/Outbound Marketing
- AFS Global Competence Certificate

Earle Russell

44 Parkins Lake Road • Greenville, SC 29607 • hrusse2@g.clemson.edu • 864-607-7989

Education

Clemson University, College of Business **Clemson, SC**
Bachelor of Science in Financial Management *Spring 2024*
Minor: Accounting, Emphasis: Commercial Banking and Investments
Cumulative GPA: 3.70/4.0

Work Experience

Elliott Davis **Greenville, SC**
Management Consulting Intern *Summer 2023*

- Assisted Clients in succession planning, strategic planning, and growth strategies; participated in consulting clients on partnership distribution decisions, process improvement, and project management.
- Learned how to create models in excel to forecast and make predictions for clients.
- Created presentations for management revolving around the 2023 banking crisis following Silicon Valley Banks collapse and the effect it could have on accounting firms such as Elliott Davis.
- Developed an understanding of M&A and MCS from leaders in the consulting and accounting field.
- Provided research regarding Industry 4.0, Generative AI, and lean manufacturings impacts on clients, and how to use AI models to add value to current and future clients.

V.M. Manning and Company **Greenville, SC**
Summer Intern *Summer 2022*

- Performed market research and analysis help wealth management advises provide financial planning to independent investors.
- Helped provide wealth management and investment advisory services to customers.
- Learned wealth management, investing, and trading strategies from successful wealth management advisors.

Softshirts **Greenville, SC**
Warehouse Picker *Summer 2021*

- Selected and prepared orders for shipment.
- Learned how to work on tight deadlines and learned how small businesses operate.

Awards, and Interests

Awards and Honors: Clemson University President's list Fall 2021, and Spring 2022, Dean's list Spring 2021, Fall 2022, and Spring 2023.

Interests: Member of Kappa Alpha Delta Omicron chapter at Clemson University. Multiple time all-state tennis player from 8th grade through junior year, 2016 South Carolina state champion and multiple time runner up. I am also greatly interested in weight training.

Peter J. Ruzzo

1 Toni Circle – North Smithfield, RI 02896 – peteruzzo21@gmail.com – 401-651-3665

EDUCATION

Clemson University, Wilbur O. and Ann Powers College of Business
Bachelor of Science in Financial Management
Minor: Accounting, Emphasis: Banking and Investment
Cumulative GPA: 3.52/4.00

Clemson, SC
December 2023

Clarkson University, Reh School of Business
Financial Information & Analysis
GPA: 3.65/4.00

Potsdam, NY
August 2018 – May 2020

RELEVANT SKILLS

- **Power Query:** Familiar with cleaning and verifying datasets in order to analyze them.
- **Tableau Desktop:** Well-versed building pleasant visualizations that can assist others in easily comprehending datasets.
- **Bloomberg Terminal:** Experience in utilizing the Bloomberg Terminal for analysis of securities and funds.
- **Microsoft Excel:** Vast knowledge of Excel and how to use it to my advantage.
- **Microsoft PowerPoint:** Skilled in creating clean and professional slide decks to use as a presentation tool.

WORK EXPERIENCE

Pakamara Investments
Analyst (5 hrs./week)

Atlanta, GA
Spring 2023

- Assisted in updating clients' monthly returns in Microsoft Excel using a Brokerage Account Statement.
- Developed several visualizations and benchmarks to help the client better understand their portfolio's current status.

Gia Ristorante Italiano
Waitstaff (30 hrs./week)

Uxbridge, MA
Summer 2022

- Waited on tables for breakfast, lunch, dinner, and large events while providing customers with a pleasant experience.
- Maintained cleanliness of the restaurant daily, while learning the importance of service to others with a sense of urgency.

Rhode Island Write on Sports
Camp Counselor (30 hrs./week)

Providence, RI
Summer 2019 & 2020, Spring 2022

- Taught under-served middle school students how to effectively research for, craft and edit an opinion piece on sports topic of choice.
- Guided students on how to interview athletes and journalists, focused on important information and writing spot stories.
- Utilized leadership skills, while also developing a sense of comradery with my co-workers.

ACTIVITIES, AWARDS, AND INTERESTS

Activities: Wall St. South Investment Club, Clemson *Tiger Newspaper* Football and Soccer Contributor, Clarkson University Varsity Baseball, Recreational Golf Club

Awards & Honors: Clemson University Dean's List 2021-2022, Liberty League All-Academic Team Spring 2020, Clarkson University Dean's List Fall 2018 – Spring 2020

Anthony Sablone

(203) 572-2218 | asablone27@gmail.com | www.linkedin.com/in/anthony-sablone

Education

Clemson University

Major: Bachelor of Science in Financial Management

Emphasis: Commercial Banking & Investment

Minor: Accounting

GPA: 3.39/4.0

Clemson, SC

Graduate: May 2024

Professional Experience

JAS Forwarding

Operations Intern

Charlotte, NC

May 2023 – Aug 2023

- Conducted thorough audits of the operations team, comprehensively reviewing 500+ accounts and resolving discrepancies to ensure accurate billing.
- Utilized Excel models to project profit and loss for current client accounts, providing valuable insights and making informed recommendations to senior management.
- Collaborated with the sales team to reach out to new clients, gaining valuable experience in understanding client needs and honing sales pitch techniques.
- Successfully contributed to business growth by identifying and securing a new client through effective sales efforts, demonstrating keen sales understanding and relationship-building skills.

160th Special Operations Aviation Regiment (Airborne) - US Army

Budget Analyst

Savannah, GA

Jan 2018 – Dec 2018

- Diligently helped manage a substantial travel budget of \$3.5 million for the 160th Special Operations Aviation Regiment (SOAR), ensuring adherence to rigorous financial guidelines and regulations.
- Executed the funding of over \$650 thousand worth of contractual purchases within the organization, ensuring compliance with stringent Department of Defense (DoD) regulations and carefully maintaining precise financial records.
- Proactively identified and implemented cost-saving opportunities, resulting in significant financial efficiencies and substantial savings for the organization.
- Demonstrated unwavering commitment to delivering exceptional customer service by expertly reviewing and approving travel vouchers, swiftly resolving issues, and maintaining unwavering compliance with exacting Joint Travel Regulations (JTR).

UConn Athletics

Video Production Assistant

Storrs, CT

Dec 2015 – Dec 2017

- Showcased exceptional expertise in videography, capturing footage of practices and games, thereby contributing to comprehensive analysis and informed strategic decision-making processes.
- Played a pivotal role in the flawless execution of live broadcasts for basketball games, operating cameras, skillfully managing the arena video board, and creating captivating highlight packages.
- Successfully expanded the reach and engagement of UConn Athletics by live-streaming diverse sporting events, elevating the organization's brand visibility and fostering an enriched audience experience.
- Collaborated seamlessly with producers, directors, and cross-functional team members to coordinate and execute dynamic live events, resulting in enhanced brand exposure and the delivery of compelling multimedia content.

Charles Sagedy

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lsagedy@g.clemson.edu

EDUCATION

Clemson University

Bachelor of Financial Management (Real Estate Emphasis), Minor in Accounting

GPA: 3.3/4

Dean's List: Fall 2020, Fall 2022

Clemson, SC

May 2024

WORK EXPERIENCE

Southern First Bank

Banking Intern

- shadowed and gained insight into several different departments such as deposits, credit, mortgage, and loan departments
- worked as a teller and gained skills in client first service while also representing the bank on the front line
- gained experience in a professional setting

Greenville, South Carolina

May 2023 – August 2023

First Team Sports

Warehouse Associate

- gained insight into a smaller business type business plan
- accounted for inventory, organized the warehouse, made deliveries
- worked alongside the retail side of the business and dealt with customers

Greenville, South Carolina

May 2022 – August 2022

Barron Residential

Construction Worker

- worked as a manual laborer/paid intern at Barron Residential Construction, a high end residential general contracting business
- worked closely alongside full time employees gaining experience in demolition, framing, finishing, etc.
- worked hard and developed an appreciation for craftsmanship

Greenville, South Carolina

May 2021 – August 2021

Allergy Partners

Landscaping Manager

- weekly landscaping throughout my time in college at the Allergy Partners Clemson office
- experience with monthly invoicing and communication with the office employees
- gained a sense of responsibility being counted on to create an appealing landscape around the office

Clemson, South Carolina

2020-2024

LEADERSHIP EXPERIENCE

Christ Church Basketball Captain

- served as high school basketball team captain my junior and senior year
- learned the importance of becoming a leader, a team player, and how to lead others
- gained a sense of model leadership, sportsmanship, and good citizenship

Greenville, South Carolina

2019-2020

Volunteer Work

- gained 60 hours of community service throughout high school as a graduation requirement
- supported various projects such as Meals on Wheels, Habitat for Humanity, Harvest Hope Food Bank, Special Olympics

Greenville, South Carolina

SKILLS, ACTIVITIES & INTERESTS

Activities: Member of Sigma Nu fraternity at Clemson, Theta Zeta Chapter, IPTAY member, intramural basketball

Skills: leadership, sales/retail, project management, Microsoft Excel, Red Cross Certification, CPR certified

Interests: travel, exercise, basketball, golf

JOEY SCHOLL

118 Purple Ct., Clemson SC 29631 · joeyscholl8@gmail.com · 803-319-1383
www.linkedin.com/in/joey-scholl

EDUCATION

Clemson University, College of Business **Clemson, SC**
Bachelor of Science in Financial Management *May 2024*
Minor: Mathematics; Emphasis: Corporate Finance

Awards: Clemson University Dean's List *Aug-Dec 2019*

EXPERIENCE

Auto-Owners Insurance Company **Columbia, SC**
Personal Lines Underwriting Intern *Summer 2023*

- Analyzed automobile and property insurance policies to determine eligibility for new business and renewals.
- Familiarized myself with company guidelines, state regulations, and industry standards to conduct risk assessment with consistency and accuracy.
- Assessed risk using multiple criteria such as: policy age, claims history, and trend analysis to ensure proper underwriting decisions.
- Communicated and maintained relationships with agents to gain pertinent policy information.
- Shadowed claims adjusters, marketing representatives, and senior commercial-lines underwriters.

Allie Katz Promotions **Lexington, SC**
Managerial Intern & Sales Associate (Present) *Summer 2022*

- Shadowed owner in order to learn key aspects of promotional business.
- Responsible for establishing promotions with leading beverage companies, inventory management, tracking expenses, and maintaining LLC accounting procedures and guidelines with limited oversight.
- Worked directly with customers through sales associate positions to gain product insight and customer feedback, then recommend practical solutions.
- Met with statewide senior executives to coordinate crucial objectives and provide suggestions for upcoming promotions.

Equitable Advisors **Clemson, SC**
Engage Case Study: Financial Planning Externship, Participant *Sep-Nov 2022*

- Shadowed a senior financial advisor at Equitable Advisors.
- Performed a simulation advising appointment with a client using cash-flow projection tools and Excel to develop a plan that satisfies the client's financial goals given client information such as assets and liabilities.
- Observed the client recruiting processes for financial advisors.

ACTIVITIES

Clemson University's Finance Club *Aug 2022 - Present*
Clemson University's Chess Club *Aug 2023 - Present*

SKILLS

-
- Microsoft Office
 - Bloomberg Terminal

William Schwab

Austin, Texas | wramage@clemson.edu | 737.224.1682

Education

Clemson University – Wilbur O. and Ann Powers College of Business

Clemson, SC

Dual Bachelor of Science

Bachelor of Science in Accounting

Bachelor of Science in Financial Management

Emphasis in Banking and Investments

May 2024

GPA: 3.50/4

Experience

The Siegfried Group

Remote

Finance Intern

Spring 2023- Present

- *Assemble, prepare, and reconcile client financial data among various company platforms*
- *Manage distribution of invoices, calculation of hourly rates, and initial contract entry into the company-wide information system*
- *Organize and ensure project accuracy and workflow with respect to client billing*
- *Train new interns on rate recalculation and distribution list updates*

Guardian Technologies, LLC

Austin, TX

Founder

Spring 2021- Present

- *Developed a software pertaining to rideshare safety*
- *Obtained a preliminary patent*
- *Negotiated with major rideshare company on business transaction*
- *Pursue potential applications for developed software*

Wall Street South Investment Club

Clemson, SC

Department of Finance, Clemson University

Fall 2022- Present

- *Manage a theoretical portfolio of \$100,000 in an annual return-based competition, placed 27/189 in 2023*
 - *Use technical, and quantitative analyses to select securities and build a diversified portfolio*
 - *Bloomberg Terminal certification expected Fall 2023*
 - *Attend a series of professional development events and seminars from prominent sector employees*
-

Organizations and Honors

- Beta Alpha Psi Honor Society
 - Dean's List
 - Wall Street South Investment Club
 - Finance Club
 - Clemson Student Investment Fund
 - Intramural Soccer
-

Skills

- Bloomberg Terminal
- Tableau
- Microsoft Excel
- Microsoft PowerPoint
- Team Coordination
- Workday
- Adobe Creative Cloud
- Proficient in French
- Project Management
- Project Budgeting

Rudra Shah
835, Old Greenville Hwy, Clemson, SC 29631
rudrashah2211@gmail.com
864-939-9632

Education

Clemson University, Clemson, SC

Bachelor of Science in Financial Management

May, 2024

Minor: Accounting

Cumulative GPA: 3.5/4.0

Related Experience

Intern: **Upstate CPAS**, Spartanburg, SC

June- July 2022

- Assisted in preparing financial statement for multiple clients
- Helped with QuickBooks data entry for monthly accounting clients
- Collaborated with 4-5 accountants to prepare quarterly payroll tax returns
- Compiled working trial balance for corporate tax returns
- Attended sales tax webinar and learned that every state has different types of taxes that they abide by

Work Experience

Cashier- Walmart, Clemson, SC

Aug-Dec 2022

- Worked 24-28 hours per week
- Maintained high level of customer service
- Worked with the cash on register
- Stocked shelves and made sure everything were at right place

Technical Skills

Proficient in Microsoft word & Excel

Basic understanding of QuickBooks

Language Skills

Multi-lingual in Hindi, Gujarati, English

Clubs & Organizations

Tri- County Technical College Student Government

Aug, 2021-Dec, 2022

Indian Cultural Association

Jan, 2023- Present

Women in Business

Present

PAUL SILVERSTEIN

Arlington, VA | p_silverstein@outlook.com | 571-269-1592

EDUCATION

CLEMSON UNIVERSITY | CLEMSON, SC

MAY 2024

Bachelor of Science in Financial Management with a minor in Accounting

GPA: 3.07/4.0

Emphasis in Banking and Investments

Honors: Dean's List Spring 2022

WORK EXPERIENCE

EAST POTOMAC GOLF LINKS | *Sales Attendant*

2022-2023

- Assisted patrons and ensured daily closing tasks were completed with the night team.
- Gained experience in customer service, inventory management, and working with teams.

GOLFDOM | *Customer Service Associate*

2021-2022

- Conducted transactions with customers using digital POS systems, sold store memberships, assisted in daily operations.
- Gained experience in sales, communication, and customer service.
- Led monthly membership sales June 2021.

ARLINGTON COUNTY | *Student Assistant I*

2018-2019

- Planned summer camp sessions and led projects.
- Gained experience in leading/teaching groups, working in a team, communication, and project planning.

LEADERSHIP EXPERIENCE

PSI UPSILON | *Treasurer*

- Elected to the executive board and served as chairman of the finance committee.
- Created and managed \$150,000 annual budget.
- Billed members and fulfilled vendor invoices.
- Prepared weekly financial reports to present to the chapter.

ACTIVITIES AND SOCIETIES

CLEMSON STUDENT INVESTMENT FUND

2023

- Researched and created a list of equities in the hospitality sector.
- Recommended three firms to join investment portfolio of \$350,000.

BLOOMBERG GLOBAL TRADING CHALLENGE | *Team Captain*

2023

- Worked with a team of students and faculty to research and compete in a trading challenge using Bloomberg Terminals.

CLEMSON FINANCE CLUB

2023

RELEVANT SKILLS

- | | | | |
|--------------------|------------------------|----------------------|----------------------|
| ▪ Budgeting | ▪ Planning/Forecasting | ▪ Excel/Pivot Tables | ▪ Communication |
| ▪ Customer Service | ▪ Tableau | ▪ Working in Teams | ▪ Bloomberg Terminal |

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RYAN SIRACUSE

SUMMARY

Soon to be Clemson University graduate with experience as a sales intern for MarketAxess. Communication, organization, comprehension and analytical skills for understanding a client's intentions and needs. Experience in understanding proper procedure to meet client's individual needs. Understanding of current market conditions and future market forecasting.

SKILLS

Computer Skills

- Have used excel extensively to summarize and compare individual firm financials.
- Have extensive knowledge of Windows OS and Microsoft Suite programs.

Communication Skills

- Pitched specific firm protocols to educate clients on functionality.
- Have made a variety of client calls with an emphasis on meeting individual needs.
- Have pitched in-development protocols to C-suite executives and board members.

EDUCATION

Clemson University, Clemson South Carolina — *Bachelor of Science in Financial Management with Financial Planning emphasis & Psychology minor*

August 2019 - May 2024

EXPERIENCE

Emberley Logistics, Lynbrook, New York — *Warehouse Clerk*

June 2023 - August 2023

- Managed shipping manifests, distributed shipping information to floor managers.

MarketAxess, New York, New York — *Sales Intern*

June 2022 - August 2022

- Worked as a sales intern pitching the MarketAxess platform to prospective clients.
- Contributed to an intern-wide presentation on implementing a new protocol for management.

Nicholas Skiba

24 East Street Hopkinton, MA | 508.259.7887 | www.linkedin.com/in/nicholasskiba | nskiba@g.clemson.edu

Education

Clemson University, Wilbur O. and Ann Powers College of Business May 2024
Bachelor of Science in Financial Management with emphasis in Corporate Finance Clemson, SC
Minors in Management Information Systems and Accounting GPA: 3.8/4.0
Clemson Business in Europe July 2022
Oxford Programme Oxford, England

Work Experience

Ernst and Young June 2023-July 2023
Financial Service Organizations Technology Risk Consulting Intern Boston, MA

- Understand and document clients' business and risks using knowledge of current IT environment
- Support engagement through detailed preparation and analysis of systems and controls walk-throughs and testing

Clemson University Athletic Academic Services August 2022-May 2022
Finance, Economics, and Statistics Tutor Clemson, SC

- Engaged with 10 student-athletes in groups and as individuals weekly while respecting NCAA policies
- Applied study strategies and collaborated with student-athletes to set SMART goals associated with learning

AIDVP February 2022-April 2022
Investment Research Intern Clemson, SC (Remote)

- Conducted market research on 25+ stocks, recording 10 notes per week
- Participated in weekly discussions regarding various research techniques, and debating stocks

Bourne Braves, Cape Cod Baseball League June 2021-August 2021
Game Day Operations Intern Bourne, MA

- Collaborated with 15-person team by coordinating concession stand operations and processing transactions averaging \$1,500 per game, while maintaining fan happiness through an average \$500 raffle per game

Leadership

Scholars of Finance, Clemson Chapter June 2022-Present
Co-Founder and President Clemson, SC

- Lead a cohort of 15+ students in development program by facilitating discovery sessions which results in full membership in the organization
- Engage with National Leadership team monthly to report on KPIs
- Communicate with C-Suite executives to organize events and create opportunities for members

Clemson University Investment Research Club January 2021 - May 2022
Analyst Clemson, SC

- Established skills relating to analysis of market trends and industry benchmarks, and conducting SWOT analysis
- Presented industry overviews relating to qualitative information by collaborating with team members
- Created an overview of food production and distribution industry titans Sysco, Aramark, SpartanNash, and PFG

Alpha Sigma Phi Fraternity April 2021-December 2021
Social Director Clemson, SC

- Allocated over \$10,000 to 12 social events with the purpose of strengthening our 100 man fraternity
- Negotiated with over 20 Greek Life members through written and verbal communication to establish future partnerships through collaborating to bring our respective organizations together

Certifications and Other Involvement

CFA Level I Candidate
Clemson University Leadership Signature Program
Training The Street Financial Modeling Program
Bloomberg Market Concepts Certification
Truist Emerging Leaders Certification

Maxson Smith

Dallas, TX 75225

maxsonjlsmith@gmail.com

214.679.0067

EDUCATION

Clemson University Wilbur O. and Ann Powers College
Bachelor of Science in Financial Management (GPA 3.53/4.0)
Minor in Accounting
Emphasis in Commercial Banking and Investments

Clemson, SC
May 2024

WORK EXPERIENCE

Permian Investment Partners

New York, NY
May 2022 - Present

Data Analyst

- Manage investment idea generation portal and sourced new opportunities for potential long-term investments, developed new screens through S&P Capital IQ to help partners with investment research
- Update daily profit and loss sheets and provided accounting assistance to CFO
- Assist analysts in value added research, including financial statement analysis and diligence call

Outlander

Dallas, TX
May 2023- Aug 2023

Summer Analyst

- Led Diligence efforts for music catalogues, ensuring comprehensive analysis and evaluation
- Utilized financial modeling techniques to support strategic decision making
- Conducted thorough market research to identify key trends, opportunities, and risk
- Developed detailed financial projections and forecasts, supporting informed investment opportunities

Portfolios with Purpose

New York, NY
Feb 2020 - May 2021

Student Ambassador

- Earned second place in global stock competition, which required meticulous attention to market trends and current events for the duration of the year
- Traveled to New York to attend educational seminars and networking events

United States Congress

Washington DC
June 2020 - July 2020

Congressional Intern

- Collaborated with students staying at George Washington University working for Rep. Pete Sessions, which provided professional development training and opportunities to meet with government official

Kappa Alpha Order

Clemson, SC
Fall 2021 – Fall 2023

Treasurer & Social Chairman

- Lead team planning and coordinate all fraternity events while overseeing a \$58,000 budget
- Involved in regular negotiation with bands, fraternities, venues, food services, etc.

EXTRACURRICULARS

Clemson Finance Advisory Board

Clemson, SC
August 2022- Present

- A 10-person advisory board, elected by previous board members, that works with the Finance Department faculty on curriculum and related matters as well as provides workshops and mentoring to students considering a degree in finance

DAN SOHN

Avon, CT | (860) 480-9607 | Dsohn23@icloud.com | <https://www.linkedin.com/in/dan-sohn-5a4434225>

PROFILE

As a rising senior financial management major at Clemson University with an emphasis in corporate finance and a minor in accounting, I am seeking to continue my career into financial advising and wealth management. I am seeking to learn as much as possible while bringing my efficiency in problem solving, communication skills, and ability to work independently or as part of a team.

EDUCATION

Clemson University

Bachelor of Science in **Financial Management**

May 2024

Emphasis: **Corporate Finance**

Minor: **Accounting**

RELEVANT EXPERIENCE

Wealth Management Intern

(May 2022 - August 2022, May 2023 - August 2023)

Phraction Management LLC

Stamford, CT

- Analyzed and organized financial data on family households to make financial management decisions.
- Researched and presented information to partners on securities of interest to help the company make financial management decisions.
- Conducting basic auditing of companies past reports and statements.
- Created spreadsheets for securities, households, and portfolio management

Landscaper,

(May 2022- August 2022)

JF Comer Landscaping

Newington, CT

- Worked with a landscaping team to build patios, do lawn improvement, and planting trees.
- Learned vital customer service skills, discipline/work ethic, and leadership skills while working long hours under harsh weather conditions.
- Acquired ability to work with clients, which will be vital in a career in financial advising.

Camp Counselor

(June 2021-August 2021)

Simsbury little league baseball

Simsbury, CT

- Worked with children which helped me to improve my patience and understanding

SKILLS

Acquired a deep understanding of **financial markets** and business judgment

Proficient in **Excel, ThinkorSwim, LucidCharts** and **Quickbooks**

Experienced in **bond** and **stock analysis** by reading through **financial statements**

Developed soft skills such as communication, team work, work ethic, and critical thinking

Organizations

A member of the Finance Club and Investment club

A member of Phi Sigma Kappa

Aidan Sowry

asowry@g.clemson.edu | [linkedin.com/in/aidan-sowry-615707231](https://www.linkedin.com/in/aidan-sowry-615707231) | 210-268-9232

EDUCATION

Clemson University, College of Business

Bachelor of Science in Financial Management

Minors: Accounting and Film Studies, Emphasis: Financial Planning

- Dr. Martin Luther King Jr. and Panthers-Richardson Scholarship Recipient
- President's List Honors: Spring '21, Spring '22; Dean's List Honors: Fall '20, Fall '21, Spring '23

Clemson, SC

May 2024

GPA: 3.76/4.00

WORK EXPERIENCE

National Financial Alliance

Finance Intern

- Assisted in portfolio management and performance reporting duties
- Performed due diligence on selected stocks, bonds and ETFs
- Aided in data entry for case design and implementation
- Shadowed executive members of the company

San Antonio, TX

May '22 – Sep '22

Streetwise Retail Advisors

Commercial Real Estate Intern

- Interacted with executives and representatives from Whataburger Restaurants, Texas Mattress Makers, and Mister Car Wash regarding economic suitability of potential real estate locations
- Created marketing materials designed to assist with tours and gain new business with potential clients
- Participated in weekly real estate meetings detailing pertinent local market information

Houston, TX

May '23 – Aug '23

Virtuoso Builders

Assistant Project Manager

- Split time working in office performing administrative work and on-site in hands-on project completion
- Communicated directly with clients to ensure customer satisfaction and review order changes
- Gained practical, hands-on knowledge of budgeting and calculating project costs

San Antonio, TX

May '19 – Sep '19

ACCOMPLISHMENTS & ACTIVITIES

Phi Gamma Delta - Chi Alpha Chapter

Executive Board - Corresponding Secretary

- Oversee recruitment, external Greek relations, publications, graduate relations, and biannual newsletter
- Attended Phi Gamma Delta's "Leadership Institute" at International Headquarters in Lexington, KY

Clemson, SC

Jan '23 - Present

Community Service Chair

- Developed monthly service-based involvement opportunities for over 110 fraternity brothers
- Contacted and worked directly with both on and off-campus organizations and programs including Shaw Center for Housing, Habitat for Humanity, and Clemson LIFE

Jan '22 – Dec '22

Beta Alpha Psi Member

- Honored as member of International honorary Accounting and Finance organization
- Received "Community Service Award" for accumulating highest amount of service hours in the chapter

Dec '22 – Present

Wall Street South Investment Club Member

- Participate in a semester long comprehensive global portfolio simulation
- Manage \$100,000 portfolio and gain hands-on experience trading securities

Aug '22 – Present

Order of Omega Member

- Selected as member of Honor Society representing the top 5% within the Clemson Greek Community
- Honored out of over 300 as September's "Member of the Month"

May '22 – Present

SKILLS

- Bloomberg, ClientWorks, Excel, PowerPoint, RedTail, Schwab, and Tableau

Griffin Stewart
(573) 382 8132
gstewa2@g.clemson.edu

Education

Clemson University	Clemson, SC
Bachelor of Science in Financial Management	May 2024
Minor: Accounting, Emphasis: Corporate Finance	3.96/4.0

Work Experience

Cuba Financial Group	June 2023 to August 2023
Intern	Cape Girardeau, MO

- Worked with Riskalyze balancing different ETFs and stocks into portfolio plans
- Participated in meetings with clients and learned about their financial situations
- Analyzed different ETF goals and assessed the best way to manage them in portfolios

Many Good Things Brewery	June 2020 to Present
Bartending	Cape Girardeau, MO

- Can and keg beer and goods for customers
- Clean and sanitize products and areas for customers
- Assisted with the various steps within the brewing process
- Have helped build relationships with customers to help the business grow since the brewery opened

Lawn Care Maintenance	August 2020 to August 2022
Self-Employed	Cape Girardeau, MO

- Cared for over 80 lawns doing things such as mowing, weed whacking, and edging
- Remove trees, plant flowers, and lay mulch or rock for 4 hours a day, 5 days a week
- Paint various outdoor areas to the customer's request to transform the lawn

Soccer Training	May 2020 to August 2022
Self-Employed	Cape Girardeau, MO

- Helped develop and train high school aged kids to grow their soccer skills
- Trained 5 different players 1-2 times a week, while keeping playing area organized
- Adapted to the players' individual learning styles to ensure our time together was always maximized

Other Experience

Clemson Club Soccer	Spring 2022 to Present
Treasurer and Captain	Clemson, SC

- Received student funding and collected player dues while managing \$7,000 of finances
- Create club's first budget to see what balls, gear, and equipment the team can afford
- Help host tryouts for 180+ new potential players over 4 days, leading different sections of the tryout process
- Help lead a team of over 55 players during practices to identify an 18-player roster for 8 league games and a 5-game tournament.

Awards

Spring President's Scholar List (4.0 GPA) <i>Clemson University</i>	June 2023
Fall Dean's Scholar List (3.5 GPA) <i>Clemson University</i>	January 2023
President's Scholar List (4.0 GPA) <i>Clemson University</i>	Fall and Spring 2021 and 2022

Relevant Skills

Proficient with Microsoft Office (Excel, Word, PowerPoint)
Good leadership/management skills and entrepreneurial spirit
Experience with Tableau

Hunter Stokes

1 Somerset Court Annapolis, MD 21403 | (410)-212-9370 | hkstoke@clemson.edu | www.linkedin.com/in/hunter-stokes

Education

Clemson University's Honors College

- Bachelor of Science in Marketing and Financial Management, emphasis in Banking and Investments
- Minors in Accounting and Spanish Studies

May 2024
Clemson, SC
GPA: 3.55/4.00

Work Experience

T. Rowe Price

U.S. Intermediaries Intern

- Headed our 12-person intern groups end of the year Capstone presentation on Thought Leadership in the retirement space
 - Learned by presenting on eight different topics ranging from retirement, asset allocation, fund pitches, trade journal, Morningstar comparisons, thought leadership, and the asset management industry
 - Shadowed Client Relationship Managers and Investment Sales Consultants on fund pitches, advisor phone calls, and running reports
-

May-August 2023
Baltimore, MD

Leadership and Involvement

Clemson Interfraternity Council (IFC)

Executive Vice President

- Generated interest and organized the structure of the new Greek village for each of the 23 chapters
- Introduced four new chapters to continue the growth of our chapter and provided them with the guidance to recruit and remain successful
- Communicate with 1000 members of the IFC community and University Administration on our judicial procedures

Nov 2022-Present
Clemson, SC

Marketing Student Advisory Board

Junior Chair

- Communicate the ideas and concerns of the Marketing student body with the College of Business administration to build a more cohesive community
- Coordinated travel plans for 30+ marketing and management students
- Secured \$2,000 in funding from the College of Business and budgeted for the annual industry trip

April 2022-Present
Clemson, SC

Clemson Undergraduate Student Government (CUSG)

Greek Affairs Director

- Liaison between Fraternity and Sorority Leadership (FSL), Clemson Administration, and CUSG to encourage a more positive and direct line of communication
- Initiate policy changes that will better the FSL community's goals
- Launch a mental health, interpersonal violence, and diversity equity and inclusion (DE&I) education initiative for the Greek community

April 2022-May 2023
Clemson, SC

Phi Sigma Kappa Fraternity

President

- Lead the chapter activities internally and serve as a representative to Clemson Interfraternity Council, Phi Sigma Kappa National, and the local community
- Manage a budget of \$120,000+ each semester to plan philanthropic, professional, and social events for all 142 members
- Problem-solve through financial, social, and mental-health related situations

Nov. 2021-Jan. 2023
Clemson, SC

Kaden Scott Teel

217 Candish Ct, Fort Mill, SC 29715
704-777-1656
kteel@clemson.edu

Education

Clemson University

Bachelor of Science in Financial Management

Minor: Management Information Systems, Emphasis: Investment Banking

Cumulative GPA: 3.1/4.0; Dean's List Fall Semester 2022

Clemson, SC

May 2024

Skills

FMC Level II Certification from Adventis

- Built a three-statement, fully circular and properly formatted financial model from scratch in under 90 minutes
- Scored greater than 90% on two multiple choice exams covering key concepts in financial modeling, accounting, corporate finance, intrinsic and relative valuation, and leveraged buyout transactions

Technology

- Obtaining BMC Certification
- Interest in and basic understanding of Python computer programming
- Microsoft Office Suite – Proficient

Work

Sully's Steamers Clemson

Part-Time Shift Supervisor

Clemson, SC

August 2021 – Present Day

- Training new employees on procedures to ensure they can independently perform their job
- Responsible for closing out the cash register and ensuring closing duties are completed
- Balancing 16-to-20-hour work week on top of full-time enrollment in Clemson University by using organizational and time management skills

Baxter Close YMCA

Lead Lifeguard

Fort Mill, SC

June 2018 - May 2022

- Ensured that staff was performing job adequately, pool operated as intended, and duties were completed at beginning and end of day
- Balanced 50+ hour work week with summer course and personal studies

Involvement

Wall Street South Investment Club Member

August 2022 – Present Day

- Participating in portfolio simulation competition where contestants aim to achieve the highest possible return while considering factors such as investment strategy and investment horizon
- Tasked with conducting research into companies, taking investment positions, and actively managing a \$100,000 portfolio

Finance Club

Creative Inquiry Stock Pitch Team

August 2023 – Present Day

- Collaborating with a team of students to research and select an investment position
- Creating and presenting a report that details research findings and investment position

BRYANT THOMAS

Phone: (706) 264-2341

Email: btthomas313@gmail.com

<https://www.linkedin.com/in/bryant-thomas-09717b1b6>

Education

- Clemson University College of Business *Grad. May 2024*
 - o Bachelor of Science in Financial Management *GPA: 3.48/4.00*
 - o Concentration: Banking & Investments
 - o Minor: Accounting

Work Experience

Byrd-McLellan Agency, Inc. (Seneca, SC) *May 2022-August 2022*

Customer Service Intern *May 2023-August 2023*

- Assisted clients with payments, endorsements to their policies, and quoting new policies.
- Received clients in-office and over the phone and sent correspondences to clients on behalf of agents.
- Utilized Applied Epic Insurance Management software as part of day-to-day activities.
- Performed deposits & receipts on the agency's cash accounts for premium payments.

The River Golf Club (North Augusta, SC) *May 2021-August 2021*

Course Outside Services and Management

- Collaborated with the golf shop to ensure smooth dispatchment of members and guests.
- Performed routine cleaning and maintenance on golf carts, restrooms, and practice facility.

Good Earth Produce & Garden Center (Augusta, GA) *March 2020-July 2020*

Product Associate

- Managed inventory, supply of products, sales floor with packaging products for sale to customers.
- Organized a rudimentary inventory tracking system alongside a coworker.

Georgia State Floral Distributions (Augusta, GA) *June 2019-August 2019*

Warehouse Associate

- Cared for flowers with managing inventory and displays.
- Prepared and delivered orders to local vendors.

Augusta National Golf Club (Augusta, GA) *April 2018*

Media Building Custodial Services

- Managed cleanliness and disposal of waste inside the Augusta National Golf Club's media building during The Masters golf tournament.

Activities & Involvement

- Clemson Finance Club - Clemson Sailing Club
- Wall Street South Club (Clemson)

Matthew Thomas

Bridgewater, NJ | 908-463-4579 | matthewthomas0813@gmail.com

EDUCATION

Clemson University, College of Business

Clemson, SC

Bachelor of Science in Financial Management

May 2024

Minor: Accounting, Emphasis: Real Estate

WORK EXPERIENCE

Payer Sciences (Publicis Health)

Morristown, NJ

Client Services Intern

Summer 2022

- Contributed toward the growth and management of relationships with clients, freelancers and other vendors
- Conducted market research on competitor portfolios including patient costs, WAC (wholesale acquisition cost), and other relevant financial information
- Ensured marketing materials were properly prepared for submission for medical/legal/regulatory review, including referencing and regulatory requirements
- Participated in idea generation at an individual and group level – presenting and 'selling' solutions aligned to marketing strategies, content, and business objectives

Wegmans

Bridgewater, NJ

Front End Customer Service

2019-2020

- Oversaw self-checkout area and provided customer assistance when requested
- Fulfilled key duties to ensure pleasant customer experience

USABL

Bridgewater, NJ

Umpire

Summer 2021

- Helped coordinate and plan tournaments and youth baseball games
- Acted as a primary umpire for youth USABL baseball games

ORGANIZATIONS

Real Estate Club- Clemson University

Fall 2023-Present

- Participate in meetings to learn about and make connections within the professional real estate industry

Wall Street South Investment Club - Clemson University

Fall 2022-Spring 2023

- Managed a virtual portfolio of \$100,000 through a competitive simulation

Liquid Church Volunteer

2015-2022

- Volunteered at winter and summer outreaches, and with mobile soup kitchen

Kappa Sigma- Kappa Upsilon Chapter

2020-Present

- Participate in philanthropy events and fundraisers to benefit the Military Heroes Campaign

SKILLS

- Microsoft Office
- Public speaking
- Financial analysis
- Interpersonal skills
- Market Research

CORY THOMPSON

cthomp23@g.clemson.edu · (843) 231-4610

EDUCATION

Clemson University

Overall GPA: 3.21/4.0

Graduation: May 2024

- Bachelor of Science in Financial Management, Emphasis in Financial Planning
- Minor in Accounting

WORK EXPERIENCE

By Design Wealth Management - Intern; Columbia, SC

May 2023 – August 2023

- Performed market research using Zacks Advisors Tools software
- Designed watchlists targeting specific bonds and equities for multiple risk tolerances
- Managed Client profiles and requests utilizing ClientWorks CRM software
- Created Financial plans using Right Capital to illustrate client's financial position and goals
- Analyzed client tax returns using Holistiplan to discover potential tax saving strategies

Frank's Ice LLC – Truck Driver/Delivery Vendor; North Myrtle Beach, SC

May 2021 – 2023

- Sold/Delivered tens of 1,000s of pounds of ice per day
- Managed truck inventory, sales and collections through a computer program
- Created invoices and secured payment for goods delivered consistently dealing with payments over \$1,000 dollars
- Loaded pallets of ice according to scheduled drops to maximize time management and adhere to truck safety laws
- Communicated consistently with warehouse for added ice drops throughout the day
- Efficient and safe pallet jack operator
- Obtained Class B CDL License August 2022

Retreat Myrtle Beach INC. - Maintenance Worker; North Myrtle Beach, SC

June 2019 – 2020

- Assisted in rental turnovers: cleaning, repairs, annual maintenance of plumbing & HVAC

LEADERSHIP EXPERIENCE AND ACTIVITIES

Pi Kappa Alpha Fraternity, Eta Alpha Chapter

November 2021 - Present

Recruitment Chairman

- Worked with a small team managing events and a budget to recruit potential new members from a pool of over 600 students

Wall Street South Investment Club

August 2023 - Present

Member

- Gained a hands-on experience managing an investment portfolio of \$100,000 through a comprehensive trading simulation featuring stocks, bonds, mutual funds, options, and more

ADDITIONAL INFORMATION

Computer Skills: Microsoft Office Suite, Google Drive Suite, Zoom, Tableau, Social Media, Holistiplan, ClientWorks, Zack's Advisor Tools, RightCapital

Soft Skills: Organized, Detail Oriented, Team Oriented, Self-Motivated

Interests: Finance, Golf, Football, Basketball, Fishing, Winter Sports, PickleBall, Exercising

MASON TURNER

721 North Almond Drive Simpsonville, SC · (864)-979-2944
Mkt4@clemson.edu

EDUCATION

AUGUST 2021- SPRING 2024

CURRENT UNIVERSITY, CLEMSON UNIVERSITY

I am pursuing a Bachelor of Science degree in Financial Management from the School of Business with a minor in Accounting and an Emphasis Area in Real Estate. I took 32 college credits while playing basketball, running cross country, and having a part time job in high school, which has allowed me to be on pace to graduate in three years. I currently have a 3.5 GPA and involvements in clubs and organizations that have furthered my knowledge of the business world.

EXPERIENCE

SUMMER 2023

FINANCIAL DATA INTERN, SCANSOURCE INC. (INTELISYS)

Over the summer program, I gained the knowledge of how to manipulate and perform data-based tasks for ScanSource's internal network, RPM. This included processing Addendums, performing monthly commission report updates across a range of suppliers, and providing the New Billings reports to my manager and the president of Intelisys. I also was able to expand my knowledge of the hybrid technology distribution channel and offer my insights on how Artificial Intelligence can improve customer relations through a luncheon presentation at the conclusion of the program.

SUMMER 2022

DATA INTERN, RESURGENT CAPITAL SERVICES

As an intern, my project was to do research for Resurgent's DJ (Dormant Judgment) team to speed up the collection process, which would lead to Resurgent gaining higher returns on the suits. I gained the knowledge of a professional workspace and new skills. These skills included presentations on the monthly updates to the company, SQL software training to navigate company data, and finding new ways to approach problems that appeared to be dead ends.

SKILLS

- Hardworking and Attentive
- Power BI
- SQL
- Excel Proficiency
- Uplifting and Positive Attitude
- Mathematics

ACTIVITIES

I enjoy volunteering at Let There Be Mom, God's Pantry, Harvest Hope Food Bank, and I am currently looking into becoming a big brother for the Big Brothers Big Sisters Foundation post-graduation. I have been involved with intramurals, Religious Groups, the Future Actuaries Club, and FCA during my time at Clemson. I also enjoy spending time with family as I couldn't be where I am today without them. Finally, I spend time on simulators that show the front office needs and monetary flow of professional sports teams.

EDUCATION

Clemson University - Wilbur O. and Ann Powers College of Business

Bachelor of Science in Financial Management

Emphasis Area: Corporate Finance

Minors: Accounting & Management Information Systems

- Cumulative GPA: 3.6/4.0
- Honors: Multiple semesters on President's and Dean's list

Clemson, SC

June 2020 - May 2024

RELEVANT WORK EXPERIENCE

CommScope

Sales Acceleration Intern

Charlotte, NC

May 2023 – August 2023

- Conducted a market analysis of partners who sold only Wi-Fi products, answering key questions and providing insights using POS data over a 5-year period
- Developed Tableau dashboards displaying key information in streamlined visuals
- Delivered strategic proposals to the Sales Acceleration Leadership Team for their next Customer Based Initiative
- Directed bid award analysis, examining previous years' E-Rate data to support competitor breakdown
- Performed competitive analysis focused on best-selling products and market share on a year-over-year basis

AccelaVue

Consulting Intern

Charlotte, NC

May 2021 – July 2021

- Project managed a web redesign effort including developing and baselining the initial project plan, gathering and grooming requirements, identifying vendors, and creating web content
- Created a 200+ slide organization chart using Microsoft PowerPoint, aligning employees with their department and direct reports
- Developed and implemented a resume template for over 60 employees

OTHER WORK EXPERIENCE

Clemson University Barnes & Noble Bookstore (Clemson, SC) ~ *Bookseller* ~ August 2023 – Present

DoorDash (Charlotte, NC | Clemson, SC) ~ *Delivery Driver* ~ May 2020 – Present

Student Phonathon Center (Clemson, SC) ~ *Student Fundraiser* ~ February 2023 – April 2023

Carolina Lakes Golf Club (Fort Mill, SC) ~ *Equipment and Maintenance Assistant* ~ June 2022 – December 2022

Fike Recreation Center (Clemson, SC) ~ *Operations Assistant* ~ June 2021 – December 2021

LEADERSHIP EXPERIENCE

Alpha Sigma Phi

Vice President

Clemson, SC

December 2021 – December 2022

- Managed all risk-related responsibilities of a fraternity with over 120 members
- Ensured all fraternity social functions attended by over 500 people were registered with Clemson's Interfraternity Council and Clemson Police Department
- Additional leadership includes Pledge Class Vice President, Intramural Chairman, & Judicial Committee

Wall Street South Investment Club

Executive Board Member

August 2023 – Present

- Managed all communication-related responsibilities in club of over 100 junior & senior members
- Attended and participated in executive meetings and introduced guest speakers

ADDITIONAL INFORMATION

Extracurricular International Volunteer HQ – Costa Rica, Phi Sigma Pi Honors Fraternity, Scholars of Finance,

Activities: Clemson Financial Planning Association, Clemson Real Estate Club, Order of Omega, Club Tennis

Computer: Proficient in all Microsoft Office products (including Project); Proficient in Tableau

Andrew J. Walsh

(803) 973-2417 | Walshdrew1@gmail.com | <https://www.linkedin.com/in/drew-john-walsh/>

Summary

Graduated high school as a dedicated student athlete with a 4.6/5.0 GPA as well as being a member of various clubs and student government. Currently studying at Clemson University while maintaining a 3.8/4.0 GPA.

Work Experience

United Way

Winter of 2022/23

Donor Services Intern

Columbia, SC

- Assisted in organizing pledge envelopes and files efficiently and effectively.
- Audited campaign envelopes for cash and checks and prepared deposits for such.
- Scanned pledge information into donor management database.
- Assisted with preparing electronic files for import into the donor management database.

Auto-Owners Insurance

Summer of 2022

Personal-Lines Underwriting Intern

Columbia, SC

- Reviewed incoming policies for auto and homeowners' insurance policies.
- Completed over one thousand insurance policies, from renewing existing customers' insurance claims to accepting policies from new customers.
- Spoke with over two hundred Insurance Agents to persuade them to choose Auto-Owners for their clients.
- Attended weekly meetings with other interns, as well as upper-level employees throughout the company.
- Traveled with Marketing Representatives.
- Traveled to a testing facility to witness the effects of weather events on various materials and structures.

Marble Slab Creamery and Great American Cookies

May 2017 to January 2022

Shift Leader

Columbia, SC

- Delegated tasks to employees while monitoring activities and responsibilities.
- Supervised, motivated and trained employees to maintain productivity and customer service satisfaction.
- Monitored and managed inventory.
- Worked in production, making the ice cream, cones, cookies, cakes, and other products.
- Served customers and managed cashier duties.

Education

Clemson University

May 2024

- Bachelor of Science in Financial Management
- Minor in Accounting
- Emphasis in Corporate Finance
- President's List (Spring 2021 and Fall 2021)
- Dean's List (Fall 2020 and Spring 2022)
- Real Estate Club Member
- Finance Club Member
- Intramural Kickball, and Soccer Champion (2x)

Clemson, SC
GPA 3.8/4.0

Maastricht University

Spring 2023

- Met, worked, and lived with peers of diverse nationalities and cultures. Maastricht, Netherlands
- Successfully balanced both school and travel in order to broaden horizons on all fronts.
- Taught fellow Clemson students how to navigate study abroad and the steps to achieve exchange student status.
- Encountered and adapted to different learning techniques such as block semester scheduling and Problem-Based Learning.

Relevant Skills

- Experience with Microsoft Office (Excel, Word, PowerPoint)
- Experience with Tableau Software
- Excellent communication skills
- Goal-driven
- Team player
- Strong time management

ALEXANDER P. WATSON

810 General Cornwallis Drive, West Chester, PA 19382 * apwtsn@clemson.edu* 484-999-4077

Education

Clemson University, College of Business

Bachelor Science in Financial Management

Minor in Accounting, emphasis Corporate Finance

Clemson, SC

May 2024

Work Experience

Lorenzo's Pizza, Front of Store, West Chester PA

May 2022 – August 2023

Split Rail Tavern, Busser / Server, West Chester, PA

May – August 2021

Clean Juice, Open/Closed Store and Prep Work, Glenn Mills, PA

May 2019 – August 2019

Business School Projects

- Developed data visualization tools to deliver financial performance measures using publicly available corporate balance sheets, income statements, and cash flows.
- Completed Operations Management simulation to optimize inventory management and supply chains across 3 franchise business with varying demand needs. Earned an A and recognized as one of the top performers in the course.
- Developed computer code to create basic websites, perform data analytics, and scripts to automate recurring tasks using PYTHON.
- Delivered presentation on organization management describing how larger companies leverage psychological principles to increase productivity and employee satisfaction.

Service

Habitat for Humanity

November-December 2021

- Managed inventory and repaired donated furniture for resale at Habitat for Humanity storefront.
- Handled invoicing/receiving of warehouse items for accounting purposes

Relevant Skills

- Experienced working with the public and promoted to busiest shifts to deliver high quality service
- Comfortable working in a team environment and delivering work on time.
- Experienced Using Python, Word, Excel, and PowerPoint

Other Information

Member Clemson University Finance Club

PADI Certified Scuba Diver

Played High School Baseball and Crew

JOHN "JACK" WEBSTER

Jkwebst@g.clemson.edu • (469) 340-8788

EDUCATION

Clemson University Bachelor of Science, Financial Management, Accounting Minor May 2024
Financial Planning Emphasis
Overall GPA: 3.50/4.00

WORK EXPERIENCE

Carolinas Wealth Management – Client Service Specialist; Seneca, SC January 2023 – Present

- Interact with clients and prospects to deliver premium financial services, ensuring their goals are being met
- Evaluate and implemented marketing strategies to increase business and reach potential clients
- Collaborate with clients about events, financial issues, tax documents, and miscellaneous paperwork, while complying with all regulatory requirements
- Use Microsoft Excel to manage, report, and organize clients profiles with accuracy and confidentiality

J.P. Morgan – J.P. Morgan Advisors Summer Analyst; Palm Beach Gardens, FL June 2023 – August 2023

- Analyzed and present equity investments to team of wealth partners and advisors
- Engaged with J.P. Morgan research analysts, third party analysts, and current events to better understand macro and micro market tendencies
- Prepared complex projects to analyze portfolio holdings and sector weightings to better serve the needs of each client to learn how to optimize custom portfolio on client specific needs
- Worked directly with Client Associates to onboard different accounts, wire money, Connect, and Salesforce

Clemson Academic Success Center- PAL Leader; Clemson, SC January 2022 – December 2022

- Prepare and lead biweekly personalized study sessions for "Introduction to Accounting" students in need of mentoring
- Collaborate weekly with professors to create student engagement strategies regarding pertinent course materials

Duke Wealth Management - Intern; Dallas, TX June 2022 – July 2022

- Reported directly to the President and owner of the company, shadowing management activities, and client engagements, including client meetings regarding wealth portfolios and strategic wealth planning
- Monitored returns on publicly traded equities and provided organized and concise findings to the team of advisors

LICENSES & CERTIFICATIONS

Securities Industry Essentials (SIE) August 2023

LEADERSHIP EXPERIENCE AND ACTIVITIES

Pi Kappa Alpha Fraternity, Eta Alpha Chapter - Chaplain January 2022 - Present

- Lead weekly bible studies for over 100 active members

Boy Scouts of America – Eagle Scout April 2018 - Present

- Recruited team members, donors, and resources completing a 240-hour service project
- Organized and led a project constructing over 100 lockers for the Saint Phillips School, Dallas, TX

HONORS (Clemson University)

Dean's List Spring 2023, Fall 2021, Fall 2020

ADDITIONAL INFORMATION

Computer Skills: MS Excel, Word, Tableau, Power BI, Salesforce

Work Eligibility: Eligible to work in the U.S. with no restrictions

COLE A. WELLS

cawells012@gmail.com

864-735-4435

EDUCATION

Clemson University, Wilbur O. & Ann Powers College of Business

Bachelor of Science, Financial Management

Emphasis in Corporate Finance, Minor in Accounting

Anticipated Graduation: May 2024

Cumulative GPA: 3.06/4.0

EMPLOYMENT HISTORY

Thornblade Club

Waiter

Greer, SC

June 2022 - Present

- Greet customers and hand out menus.
- Take meal and beverage orders from customers and place these orders in the kitchen.
- Make menu recommendations and inform patrons of any specials.
- Deliver meals and beverages to tables when they have been prepared.
- Prepare the bill for tables when requested.
- Administer change to tables if needed.

Coach House

Waiter

Simpsonville, SC

May 2021 – Aug 2021

- Staying attentive to the needs of guests in the dining area
- Delivering food from the kitchen to the guests
- Ensuring the food order is made correctly by kitchen staff and looks presentable for guests
- Following health code standards with regards to the handling of food
- Performing shift duties like delivering racks of cups to the service station, rolling silverware, pre-bussing tables, wiping tables and removing debris and more

LEADERSHIP EXPERIENCE & INVOLVEMENT

Clemson Investment Research Club

Member/Group Leader

Clemson, SC

Sept 2022 – Present

- Led bi-weekly group discussions regarding portfolio selection
- Led second best group in the club in terms of our returns

NHC Nursing Home

Volunteer

Mauldin, SC

August 2015 – November 2016

- Volunteered where needed within the facility to interact, entertain, and assist with Residents of Nursing Home
- Provided company to elders during activities such as bingo

AWARDS, SKILLS, & INTERESTS

- Clemson Dean's List
- Clemson Wall Street South Club
- Clemson Finance Club
- National Honor Society
- National Beta Club
- Varsity & Junior Varsity Soccer throughout High School career
- Intramural Sports while attending Clemson University
- Proficient in Excel, Word, and PowerPoint

Daniel R. Wharton

34 Fairview Heights Parkersburg, WV 26101

(304)-917-1221 dwharto@clermson.edu

Education

Clemson University, College of Business

Clemson, SC

Bachelor of Science in Financial Management

May 2024

Emphasis Area: Commercial Banking and Investments, Minor: Accounting

Cumulative GPA 4.00/4.00

General Honors, Departmental Honors in Finance

Work Experience

United Bank (UBSI)

Parkersburg, WV

Treasury Intern (30 hours/week)

Summer 2023

- Conducted quantitative and qualitative credit analysis of corporate and municipal bond portfolios held by UBSI.
- Built and monitored the daily liquidity models for executive management and accounting personnel.
- Reviewed and updated earnings forecast data throughout the summer from six earnings analysts and constructed weekly documents for UBSI's Asset Liability Committee.

Parkersburg Country Club

Vienna, WV

Golf Shop Attendant (30-40 hours/week)

Summer 2021, 2022, and 2023

- Performed daily upkeep of golf course operations (sanitation of equipment and facilities, maintenance on equipment, restock of supplies and inventory, opening and closing procedures, etc.).
- Customer service obligations including selling merchandise and answering phone calls.
- Managed golf course scheduling for tee times, events, matches, and private lessons for club members.
- Teaching morning golf clinics for the young children of members.
- Making returns, deliveries, and pick-ups at local business partners and suppliers on behalf of the Club.

Wharton Auto Group

Parkersburg, WV

Lot Attendant (15 hours/week)

Summer 2021

- Washing, detailing, cleaning, and handling of cars (both customer and inventory).
- Performing inventory rearrangement and organization for cars on the dealership lot.

Academic Extracurriculars

Wall Street South Investment Club (WSS)

Fall 2022- Present

- Invested a \$100K virtual portfolio over an academic year experimenting with a variety of strategies; returned 5.5%.
- *Executive Board Member (Officer Position)*; administrative board organizing club operations and speaking events.

Finance Club

Fall 2022-Present

- Worked with peers to improve resumes and attended guest speaking events with financial management relevance.

Additional Activities, Associations, and Distinctions

Organizations: Clemson Honors College, Honor Society of Phi Kappa Phi

Activities: Real Estate Club, Finance Club, Wall Street South Investment Club (WSS)

Scholarships: George C & Kathleen Wright Scholarship, O.J. Stout Scholarship Fund, Out-of-State Tuition Scholarship

Cole Michael Williamson

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EDUCATION

Clemson University, College of Business

May 2024

Bachelor of Science in Financial Management

Minor: Accounting, Emphasis: Real Estate

Cumulative GPA: 3.26

WORK EXPERIENCE

Truck Specialized Parking Services

May 2019 – Apr 2022

- Logistical Infrastructure Company providing freight fluidity
Data Analytics Specialist
 - Monitored and reported on data services for technology platform
 - Responsible for management of Governmental Contract
 - Validated systems met all requirements as per contractual agreement

Sea Suds Marine LLC

May 2019 – Present

- Marine detail business which provides superior care to state of the art vessels
Owner/Operator
 - Maintain customer relations
 - Manage scheduling and staffing needs
 - Produced annual profit and loss statements

Red's Ice House Dockside

April 2019 – Aug 2021

- Waterfront Restaurant providing the perfect spot for taking in Lowcountry Wildlife
Dockhand/Boat Valet
 - Assisted boaters with safely embarking and debarking for restaurant
 - Managed challenging marine conditions with customers assets

Exteriors By Ravenel

May 2019 – Sep 2019

- Lawn care business that specialized in perfection of residential estates
Appearance Technician
 - Assisted owner with prioritizing schedules and maintaining customer satisfaction

West Marine

Aug 2017 – July 2018

- Marine Retail Outlet
Sales Associate
 - Provided sales support for products and services

EXTRACURRICULAR ACTIVITIES

Treasurer - National Wild Turkey Federation (Clemson Chapter)

Clemson University

- Board Member - Responsible for Chapter Annual Finance Reports, monitors Chapter expenses and dispenses funds
- Active member seeking science-based conservation and hunter's rights through education and volunteer opportunities

Clemson Finance Club

Clemson University

- Connected with numerous undergraduate business students and attended business workshops to further academic learning within a living community

Clemson Real Estate Club

Clemson University

- Active member seeking CoStar Certification and access to local Real Estate Industry Professional Mentoring

Alpha Gamma Rho Beta Zeta Chapter

Clemson University

- "The purpose of Alpha Gamma Rho is to make better men, and through them a broader and better agriculture"

VOLUNTEER WORK

Palmetto Artisan Business Camp

- Volunteered as Camp Counselor for inner-city children (Entrepreneurship Program)

Charleston Water Keeper

- Worked with Charleston Waterkeeper to protect, promote, and restore the quality of Charleston's waterways while ensuring the public's right to swimmable, drinkable, and fishable water.

Bryce Willis

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26 Still Creek Court, Greer, SC 29651

Education

Bachelor of Science in Financial Management

Clemson University

Minor: Accounting

Emphasis: Corporate Finance

December 2023

Clemson, SC

Experience

Cardinal Logistics Management

Business Development Intern

Alpharetta, GA

June 2023-Present

- Facilitate transactions with carriers, managing loads and determining rates for optimal profitability.
- Negotiate with carriers to ensure timely and efficient load coverage, while maximizing value generation.
- Proactive communication with carriers to resolve any issues and track shipments.
- Collaborate with the sales team, providing rate quotes and strategically selecting profitable loads, resulting in an 8.49% revenue increase in June vs previous month.

Cardinal Logistics Management

Drayage Accounting/Operations Intern

Alpharetta, GA

June 2022-August 2022

- Supported transportation networks to grow their business profitability.
- Assisted in financial accounting by processing invoices and internal audits to make drayage profitable.
- Tracked and booked orders from international ports to national facilities to ensure efficient shipping.

Fresh Prints

Campus Manager

Clemson, SC

June 2021-October 2022

- Increased semester sales by 64% through business development and lead generation.
- Managed client accounts and explored new leads to facilitate continued growth.
- Collaborated cross functionally with a team of artists to create design proofs for clients.
- Negotiated pricing and provided quality assurance to ensure a seamless customer experience.

Flying Rabbit Adventures

Rescue Guide and Registrations

Greenville, SC

June 2021-August 2021

- Guided customers and executed rescues for customers requiring aid.
- Endorsed and coordinated reservations for walk up and online customers.
- Promoted merchandise to complete sales for customers.

Bonjour Crepe

Waiter

Greenville, SC

May 2020-August 2020

- Served customers including taking orders and serving food to provide an efficient, positive experience.
- Professionally trained in customer service by a Restaurant Operations Consultant with US Foods.

Achievements & Activities

- Brother-2-Brother Organization
- Phi Gamma Delta fraternity at Clemson
- Finance Club
- Wall Street South Investment Club

Skills

Microsoft Excel (Proficient)

JMP Pro 14 (Proficient)

TMW.Suite (Proficient)

Tyler Zieker

10 Magnolia Drive, Saratoga Springs, NY 12866 – 518-338-2985 – tzieker@clemson.edu

EDUCATION

Clemson University Clemson, SC May 2024
Bachelor of Science in Financial Management
Minor: Accounting, Emphasis: Financial Planning
Cumulative GPA: 3.82/4

WORK EXPERIENCE

United Bank Charleston, SC June-August 2023
Summer Intern

- Rotated through commercial lending, credit analysis, wealth management, and more
- Received valuable tips on networking and professional development

Salt & Char Saratoga Springs, NY May-August 2022
Assistant Captain

- Greet guests and maintain tables throughout their stay
- Communicate with coworkers to ensure guests' needs are met

Prime at Saratoga National Golf Club Saratoga Springs, NY July 2018-August 2021
Banquet Server

- Set up and break down banquet rooms for events
- Interact with guests and see to their needs

LEADERSHIP AND INVOLVEMENT

Psi Upsilon Fraternity Clemson, SC January 2021-Present

- Tau Epsilon Chapter, Academic Chairman, New Member Educator

Wall Street South Investment Club Clemson, SC August 2022-Present

- Investing and managing mock-portfolios
- Working with Bloomberg Terminals

Finance Club Clemson, SC August 2023-Present

- Networking with recruiters, peers, and professors
- Resume workshops

Charleston Intern Network Series Charleston, SC June-August 2023

- Received insight on professional growth from panels of local executives
- Networking with peers throughout the Charleston area

SKILLS, AWARDS, AND INTERESTS

Skills: Proficient in Microsoft business applications including Excel, PowerPoint, and Word

Awards: President's List Spring-Fall 2022, Dean's List Fall 2020-Fall 2021 & Spring 2023

Interests: Golf, hiking, professional & collegiate sports

William Zimmerman

wkzimme@clemson.edu | 803-543-9021 | 2104 Woodmere Dr. Columbia, SC 29204 | www.linkedin.com/in/wkzimme

EDUCATION

Clemson University, Powers College of Business Clemson, SC
Bachelor of Science in Finance Management, Corporate Finance Emphasis May 2024
Minor in Accounting

WORK EXPERIENCE

Zimmerman Contracting Company Columbia, SC
Employee Summer 2019 – 2023

- Remodeled the estimate and invoicing process in QuickBooks for 25+ customers
- Developed multitasking skills necessary for accomplishing 5 different tasks on hand
- Operated and managed 3 separate cloud-based systems pertaining to operations and customer relations

Pixie and Bill's Restaurant Clemson, SC
Bartender, Host, Server March 2022 - Present

- Established customer loyalty through outstanding and consistent service
- Resolved customer complaints promptly in accordance with restaurant policy
- Responsible for overseeing cash and credit card transactions and inputting information into databases

LEADERSHIP & EXTRACURRICULARS

Clemson Photography Club Clemson University
President, Social Media Chair May 2021 – May 2024

- Provided technological support and collaborated with 40+ members
- Addressed and recruited 40+ photographers from a variety of disciplines
- Gained substantial experience with the Adobe Suite – Photoshop, Lightroom, and Illustrator

Wall Street South Investment Club Clemson University
Member August 2022 - Present

- Utilized Bloomberg Financial Market Terminals
- Attended monthly presentations focusing on trading securities, investments, and managing portfolios
- Managed a mock portfolio of \$100,000 and simulated trading stocks, options, futures, bonds, ETFs, and mutual fund

South Carolina Honors Orchestra Columbia, SC
Sectional First-Chair April 2018 – 2020

- Lead role in sectional practices and rehearsals for 12 cellists
- Harmonized with 50+ talented musicians from around the region
- Collaborated with 52 orchestra members and orchestra director for 3 concert pieces, annually

National Art Honors Society Columbia, SC
Historian, Treasurer May 2018 – May 2020

- Documented and photographed 2 formal ceremonies per semester
- Orchestrated annual fundraising events for St. Jude's Children's Hospital
- Organized monthly meetings for local NAHS of 15+ member chapter at A.C. Flora High School

COMPUTER SKILLS

- Microsoft Office Suite, Adobe Photoshop and Lightroom CC, and QuickBooks (invoicing, payroll services, and expense tracking)