

Student Name

5 College Court • Rochester, NY 14618 • (585) 222-2222 • sname01@mail.naz.edu

EDUCATION

Nazareth College of Rochester

Rochester, NY

Bachelor of Science

May 2016

- Double major in Finance & Economics, GPA 3.82/4.00
- Phi Kappa Phi National Honor Society (top ten percent of class)
- Financial Executives International Scholar
- Nothnagle Memorial Award Winner
- *Athletics*: Member of the Nazareth College NCAA DIII ice hockey team – team captain all four seasons

WORK EXPERIENCE

Flower City Capital, LLC. (January 2016-Present)

Rochester, NY

*Flower City Capital – a wealth management and financial consulting company
Consulting*

- Assisted with the financial consulting of a local start-up company in Rochester, NY, working directly with the CFO and helping to establish financial processes and develop corporate strategy
- Trusted with the day-to-day responsibilities of a controller and responsible for liaising with company vendors and clients
- Led several other projects including the organization of the company's 1099 tax process, and updating all company and employee HR records to be compliant with state and federal laws

Wealth Management

- Read research papers and worked directly with portfolio manager in discussing the construction and asset allocation for different clients portfolios
- Researched, analyzed, and valued a company using a 3-statement model to establish whether to include it in client portfolio's
- Helped with client onboarding by preparing and distributing all necessary documents, statements, account transfer forms, etc
- Reviewed and discussed the different aspects of clients' financial plans with CFP before and after his meetings with clients

Toshiba Business Solutions, (Summer 2015)

Rochester, NY

Finance Intern

- Undertook aftermarket rebate project: researching accounts for rebates that were due to Toshiba, totaling over \$100,000. Grew the total rebate over \$15,000 from the prior submission increasing company profits by that amount
- Prepared data extracts for leasing companies, including research and auditing when information was missing. Became familiar with two different leasing company systems as well as Toshiba's enterprise resource planning system (Oracle), document management system (Docuware) and client-billing database (Tesseract)
- Performed special projects for Regional President
- Identified general ledger codes and determined the cost of goods sold distributions for invoices

Academic Advisement Center, Nazareth College of Rochester (5/14-8-14)

Rochester, NY

Office Clerk

- Responsible for providing administrative support for the office to make sure that all operations within were running efficiently
- Undertook the task of using Microsoft Excel spreadsheets to input all incoming student information and creating new files for the students
- Handled any questions and concerns from incoming students and families daily and scheduled meetings and appointments
- Assisted with student orientation days introducing new students to their advisors and to the school

LEADERSHIP EXPERIENCE

Golden Flyer Investment Fund, School of Management (11/15-5/16)

Rochester, NY

President & CIO

- Oversaw student managed investment fund of \$100,000 provided through the School of Management
- Planned/organized all meetings, created an investment objective, investment policy statement, investment process, and asset allocation

Nazareth College Finance Society, School of Management (9/14-5/16)

Rochester, NY

Vice President

- Worked with board members to plan and organize finance related events on campus, and ran meetings as needed

Student Athlete Mentors (SAMS), Nazareth College Athletics (9/12-05/15)

Rochester, NY

Mentor - Collaborated with other athletic leaders to discuss ways to improve team functionality and plan team events