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## **EDUCATION**

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### **University of Minnesota Duluth**

B.A. in Financial Planning and Finance

Anticipated May 2021

GPA: 3.36/4.0

Relevant Coursework: Investment Fundamentals, Fundamentals of selling, Managerial Finance, Corporate Finance.

## **ACADEMIC EXPERIENCE**

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### **University of Minnesota Duluth**

#### *Financial Peer Mentor*

January 2019 – May 2019

- Assisted students in personal financial situations such as student loan applications and personal investments by teaching budgeting techniques and financial literacy tools
- Scheduled meetings with students and created an agenda to cover in our time together.
- Utilized listening skills to fully understand the concern of my mentee and provide the best answer or direct them to someone who could answer the question.

#### **Investment Fundamentals**

Fall 2019

- Found the optimal portfolio for a theoretic client by using historical data to project risk and return.
- Effectively managed and selected securities for a portfolio with a starting balance of \$500,000 to yield a return of 17.3% in 10 weeks.

## **RELEVANT EXPERIENCE**

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### **Wells Fargo, Arden Hills/Duluth, MN**

June 2019 – Present

#### *Teller*

- Ensured financial transactions were processed accurately and efficiently while complying with all policies, procedures and regulatory and banking requirements.
- Exceeded the company's "conversation" goal by 15% each week.
- Resolved service issues and share the benefits of additional services.
- Maintain confidentiality of bank records and customer information.
- Engaged in customer conversations and made sure their needs were met.

### **Hockey Central INC, Blaine, MN**

June 2015 - September 2018

#### *Sales Representative*

- Provides educated recommendations based on customer's needs and objectives.
- Assists customers in finalizing the purchase of the product; processes type of payment and make sure the customer is given a receipt and exact change.
- Immediately attends to customer complaints and works to have it resolved in the fastest way possible.

## **Skills and interests**

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- Computer: Proficient in Excel, Word, and PowerPoint.
- Interests: Golf, Motorcycle Enthusiast, Hockey.