

# Eric Schmitz

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## Professional Summary

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Fundamental-oriented individual who values the process over the result, knowing that a detail-focused process will bring forth the best result. Student-athlete who recognizes the importance of pulling ideas from different perspectives and how team success is predicated on commitment over all else. A well-rounded Finance and Financial Planning major who has a genuine passion for forging deep relationships with individuals and assisting them through the financial decisions that life brings.

## Education

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- Degree: Finance B.B.A./Financial Planning B.B.A. | Expected Graduation: Spring 2021
- University of Minnesota Duluth | Labovitz School of Business
- Cumulative GPA: 3.29
- Financial Planning Club
- Varsity Football Team

## Experience

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Bilitz Financial Intern (December 2019-January 2020)

Paul C. Bilitz | Investment Advisor Representative, Fond du Lac, WI

- Prepared and reviewed client documentation
- Attended and detailed client meetings
- Reviewed various mutual funds, REITs, and their performances
- Contacted investment management companies and inquired about fund closings

Peer Advisor (January 2019-December 2019)

Financial Peer Mentor Program, University of Minnesota Duluth, MN

- Administered support to fellow undergraduate students through education and thorough analysis of their financial situation
- Used problem solving skills to create a financial plan of action
- Applied interpersonal skills to develop a professional and trustworthy relationship with the mentee

Sales Associate (May 2019-August 2019)

Mosquito Squad of Northeast Minnesota, Cloquet, MN

- Delivered sales presentations to a range of prospective clients
- Answered client questions about products, prices and availability
- Obtained deposits and balance of payment from clients
- Maintained client records and exceeded sales goals

Information Systems Intern (July 2015-July 2017 / December 2019-January 2020)

Fond du Lac County IT Department, Fond du Lac, WI

- Handled the initial preparation and set up of computers, including the operation system and software installation
- Provided routine training and maintenance of new operation system for employees

## Skills

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- Using sales techniques to sell products and services to customers
- Analyzing financial situations and developing tailored solutions
- Documenting and reporting transactions
- Providing financial mentorship and guidance
- Leading others through collaboration and clear communication
- Operating computer software and applications to carry out daily operations and assist others