

NAME

TITLE

000-000-0000 / EMAIL / CITY, STATE, ZIP

Profile

Eager investment banking intern seeking my first official position as an investment banker with an experienced and savvy investment banking agency, who is looking for an investment banking position where I can utilize my on-the-job knowledge and skills to grow my financial analysis experience and assist clients.

Experience

Investment Banking Intern - Company / Location

MONTH YEAR - Present

- Assisted with conducting financial analysis of client accounts to determine potential financial moves.
- Developed relationships with clients to build trust, driving business and increasing profit for both parties.
- Prepared a strategic plan to analyze the growth of the business on a weekly and monthly basis.
- Collaborated with other investment banking interns and experienced investment bankers on strategies to build financial stability for clients.
- Evaluated potential acquisitions under the direction of a preceptor.

Part-Time Bank Teller - Company / Location

MONTH YEAR – MONTH YEAR

- Handled cash transactions such as deposits, check cashing, and customer withdrawals promptly.
- Built relationships with customers to suggest better financial services that are beneficial to their situation.
- Managed customer accounts by opening and closing accounts, handled account maintenance like ordering checks, and updated customer information.
- Complied with all bank policies and procedures to ensure customer information is protected and the bank is safe.
- Answered any customer queries about the banking process and ensured 100% satisfaction.

Project Experience

- Worked alongside experienced investment bankers in locating acquisitions for current clients based on their wants, needs, and financial situation.
- Handled a client learning conference to educate them on the risks and benefits of saving through our bank.

Education

Bachelor's Degree in Economics in Progress - University of Tampa

MONTH YEAR

- GPA: 4.0
- AWARD
- AWARD

High School Diploma - Tampa High School

MONTH YEAR

- GPA: 3.6
- AWARD
- AWARD

Skills

Expertise

- Time management and organization skills
- Proficiency with Microsoft Excel
- Research skills
- Relationship building skills
- Financial analysis

Licenses & Accreditations

Licenses & Accreditations

- Pursuing CFA certification