



*Department of*

# FINANCE

WILBUR O. AND ANN POWERS  
COLLEGE OF BUSINESS

RESUME BOOK  
2025-2026

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, 270 Burns Hall, Clemson University, Clemson, SC 29634.

### **Clemson University Finance Club Officers for 2025-2026**

Ryan Harbison	President	(Senior)
Kallie Horan	Vice-President	(Senior)
Alex Rodrigues	Vice-President	(Senior)
Evan Theroux	Vice-President	(Alumni 2024), MPAcc Program

### **Department and College Level Support:**

Faculty Advisor, Finance Club:	John Alexander
Chair, Department of Finance:	Brandon Lockhart
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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**Elaina Adamo**

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**EDUCATION**

**Clemson University- College of Business**

May 2026

*Bachelor of Science in Financial Management*

*Cumulative GPA: 3.4/4.0*

*Emphasis in Real Estate, Minor in accounting*

**RELEVANT EXPERIENCE**

**Wealth Management Intern**

New York ,NY

*Equitable Advisors*

May 2025-August 2025

- Assisted financial advisors in preparing and analyzing client portfolios and investment reports
- Collaborated with team members to attend to specific client needs and developed financial plans to align with goals to enhance customer satisfaction
- Evaluated theoretical client portfolios and assessed asset allocation, risk level, and financial goals to develop a personalized investment strategy

**WORK EXPERIENCE**

**Hospitality Staff**

Brooklyn, NY

*Table 87*

May 2024-August 2024

- Provided service to customers by attending closely and addressing any/all concerns
- Supported wait staff by setting up and replenishing condiment stands, trash containers, liners and bus stations
- Observed tables to tend to guest needs and identify customer service opportunities

**Seasonal Sales Associate**

Brooklyn, NY

*Picnic*

October 2022- Present

- Helped customers find specific products, answered questions and offered product advice
- Engaged customers in friendly, professional dialogue to determine needs
- Worked with fellow sales team members to achieve group targets
- Arranged new merchandise with signage and appealing displays to encourage customer sales and move overstock items

**CAMPUS INVOLVEMENT**

**Finance Club**

August 2024-Present

*Active member*

- Active participant in club events that include training sessions and meetings with industry professionals

**Women in Business**

August 2024-Present

*Active member*

- Active participant in events and workshops aimed at promoting professional development and empowerment of women in business

# SARAH ALLEN

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## EDUCATION

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**Clemson University, College of Business**

**Clemson, SC**

*Bachelor of Science in Financial Management*

**May 2026**

*Minor: Accounting, Emphasis: Corporate Finance*

GPA: 3.6/4.0

## WORK EXPERIENCE

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**Raymond James – Seale Wealth Management Intern; Dallas, TX**

**May 2025 – August 2025**

- Sit in on client meetings to gain experience in financial advising, portfolios, and relationship management.
- Learn to build personalized Life Plans using Raymond James' GPM software and strengthen Excel skills for financial modeling and analysis.

**Clemson University - Peer Assisted Learning (PAL) Tutor; Clemson, SC**

**January 2024 – May 2024**

- Provided coaching and instruction for Business Calculus II to a cohort of 150+ students by conducting tutoring sessions four times per week.
- Designed 50 mentor session workshops that cover a range of topics that students find challenging.

**Alcority – Human Resources Intern; Irving, TX**

**June 2022 - August 2022**

- Assisted with new hire orientation preparation, scheduling, and administration.
- Assisted with the design and implementation of the company's new job architecture and job profiles.

## LEADERSHIP EXPERIENCE

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**Scholars of Finance – Member of the Recruitment Team**

**February 2025- Present**

- Engage in discussions on ethics, leadership, and integrity in finance while networking with industry professionals.
- Leadership Development Program (LDP) Participant – Develop leadership skills through structured training, mentorship, and case study analysis in finance.

**Sales Innovation Program (SIP) - Member of the Recruitment Team**

**January 2024 – August 2025**

- Actively participated in networking events, competitive sales challenges, and regular sales club meetings.
- Delivered impactful in-class presentations and managed tabling efforts, resulting in a record 274 SIP applications, the highest in the programs history.

**Clemson Women in Business Club - Director of Engagement**

**August 2023 - Present**

- Developed strong leadership and teamwork skills through collaborative projects within the Women in Business Club for 500 members.
- Jointly leading the effort to promote awareness of the club vision and helping to grow membership.

## HONORS

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- Fall 2023 Clemson President's List, Spring 2023 Clemson President's List, Spring 2025 Clemson Dean's List

## ADDITIONAL INFORMATION

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- **Computer Skills:** Excel, Word, PowerPoint, JMP, Bloomberg, GPM
- **Member of Kappa Kappa Gamma Sorority**

# Madison Andrews

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## EDUCATION

### Clemson University

*B. S. in Financial Management, Minor in Accounting*

Concentration: Commercial Banking and Investments

Clemson, SC

May 2026

## EXPERIENCE

### School of Accountancy

*Student Assistant*

Clemson, SC

January 2025 - May 2025

- Assisted university faculty and students by managing inquiries, maintaining records, and coordinating office operations to ensure efficient workflows.
- Performed data entry through Excel, and interoffice deliveries, and maintained supply management techniques while upholding accuracy and confidentiality.
- Supported faculty with administrative tasks, including prepping and organization functions, while maintaining office functionality.

### Solé On The Green

*Server*

Clemson, SC

March 2024 - Present

- Delivered exceptional customer service in a high-pressure environment, balancing a demanding academic schedule while maintaining attention to detail.
- Built strong relationships with repeat consumers and team members, contributing to a positive experience and consistently exceeding sales targets.

### Cardinal Newman Dance Marathon

*Logistics Executive*

Columbia, SC

August 2021 - May 2022

- Collaborated with executives to maintain weekly meeting records of events across the state
- Managed and consistently tracked financial database funding sources (\$100k+)
- Collaborated with numerous small businesses to facilitate standard business operations and ensure satisfaction

## ACTIVITIES

### Clemson FinTech

*Secretary*

Clemson, SC

November 2023 - Present

- Accepted into Clemson University's first FinTech student org through a rigorous application process
- Collaborating with members to create a financial tracker app for college students using financial models
- Effectively leveraging connections with Fortune 500 companies to promote professional growth

### Holiday Wishes Fundraiser

*Planning Committee*

Blythewood, SC

August 2021 - January 2022

- Managed donations totaling \$7K+ while assisting on the approval of distributions
- Assisted in planning and executing events, focusing on budgeting, and increasing contributions by 30%
- Document meeting proceedings and discussion to ensure accurate record-keeping, while facilitating growth

### Cardinal Newman Women's Soccer

*Captain*

Columbia, SC

January 2019 - May 2022

- Led team through strategic decision-making, resulting in a 20% improvement in overall performance throughout the season
- Facilitated team practices and events, ensuring consistent development while balancing academic and athletic commitments
- Strategized effectiveness of specific metrics to determine the most optimal plans while utilizing effective communication methods to promote long term growth

## ACHIEVEMENTS & INVOLVEMENT

**Clubs:** Clemson FinTech, Clemson AI, Clemson Consulting, Clemson Financial Management, Women in Business

**Certificates:** Microsoft Excel, CPR

**Awards:** Life Scholar, BIA Scholar

**Skills:** Data Analysis, Spanish, Statistics, Sales, Bloomberg



# AVERY BACON

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## EDUCATION

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

Clemson, SC  
May 2026

## WORK EXPERIENCE

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### **BluePrint Wealth Managemnet**

*Finance Summer Intern*

Ellicott City, MD

May 2025 - Aug 2025

- Assisted with financial planning and wealth management, including portfolio analysis and client research.
- Supported advisors in preparing investment reports, retirement plans, and cash flow projections for clients.
- Gained exposure to asset allocation strategies, risk management, and financial goal-setting.
- Conducted market and industry research to support investment recommendations.

### **Clemson University Office of Military & Veteran Engagement**

*Student Assistant*

Clemson, SC

Aug 2022 – Jan 2025

- Provide consultation to potential and current student veterans on using VA education benefits.
- Plan, coordinate, and execute impactful events supporting the M&VE program's mission.
- Develop visually compelling and strategic content to promote events and program initiatives.
- Effectively manage social media presence across Instagram and Facebook to engage diverse audiences.

### **Clemson Libraries**

*Events and Outreach Coordinator Intern*

Clemson, SC

May 2024 – Dec 2024

- Orchestrated engaging student orientation events, driving increased awareness and participation.
- Designed and distributed branded welcome bags to enhance visibility of library resources and services.
- Created and executed outreach campaigns to foster greater student involvement in programs.

### **Food Services**

*Customer Service Professional*

Olney, MD

Aug 2019 – 2023

- Coordinated employee schedules and supervised daily operations to ensure productivity and efficiency.
- Trained and mentored new team members, fostering a collaborative and results-driven work environment.
- Managed multiple social media platforms to enhance brand visibility and engagement.

## COMMUNITY INVOLVEMENT

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### **Student Veterans Affairs**

*Recruitment Consultant*

Clemson, SC

Jan 2023 – Present

- Facilitated networking initiatives within the Greek Life community, resulting in successful funding
- Established and nurtured relationships across the student body to promote inclusivity and support for veterans.
- Proposed and implemented innovative fundraising ideas to meet program goals.

### **Clemson Sailing Club**

*Member*

Clemson, SC

Aug 2023 – Present

- Actively participates in program events and activities
- Learned a new hands-on skill, how to sail in a racing sailboat in challenging environments
- Collaborate with other peers in the boats for optimal performance

## ADDITIONAL SKILLS AND EXPERIENCES

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**Skills:** Excel, Tableau, Microsoft 365, Team Collaboration, Analytical Thinking and Problem-Solving

# Magdalena Bania

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## EDUCATION

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**Clemson University | Wilbur O. and Ann Powers College of Business**

**Clemson, SC**

*Bachelor of Science* in Financial Management

May 2026

Double Minor in Accounting & Spanish Studies

3.94/4.0 GPA

Emphasis in Corporate Finance

## EXPERIENCE

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**Duke Energy Corporation**

**Charlotte, NC**

**Finance Intern – SEC Reporting and Consolidations Intern**

*May 2025 – Aug. 2025*

- Executing DE Carolinas Financials in 10-Q, rolling 10-Q, 10-K & supporting end-to-end reporting cycle
- Monitoring monthly Close Process with SOX Checks
- Benchmarking, analyzing & presenting insights of 22 Peers' 10-K Risk Disclosures for executives and BOD

**Pickens County Habitat for Humanity at Clemson**

**Clemson, SC**

**Treasurer**

*Jan. 2023 – Present*

- Managed \$150,000+ budgets to build homecoming houses successfully
- Fundraised over \$83,206 by pitching detailed financial breakdowns to boards
- Volunteered on homes to serve Clemson families in need of affordable housing

**Leadership Signature Practicum**

**Clemson, SC**

**Chief Human Resource Officer**

*Aug. 2024 – Dec. 2024*

- Led HR Division of 4 departments to strategically reach objectives
- Maintained smooth operations of HR for 70+ business leadership students

**Project Leader – Mental Wellness Project**

*Jan. 2024 – May 2024*

- Planned and executed a Mental Wellness program for 64 business leadership students and the Chief Well-being Officer for Clemson University.

## HONORS AND AWARDS

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• Palmetto Fellows Scholarship

*May 2022- Present*

• Pickens Habitat for Humanity Impact Award

*Oct. 2024*

• Clemson Dean's List (3.5+ GPA)

*Aug. 2024 – May 2025*

• Clemson President's List (4.0 GPA)

*Aug. 2022 – May 2024*

## ADDITIONAL SKILLS

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- Native: English and Polish, Proficient: Spanish
- Proficient in Microsoft Office, Alteryx, Power Query, OneStream, PeopleSoft, Adobe
- Certifications: Bloomberg Market Concepts, Power BI Specialist, Tableau Desktop Specialist, Data Mining and Analytics Specialist
- Experience presenting with Bloomberg Terminal and Python project



# Anna Bastuga

Chicago, IL

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## EDUCATION

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

*Bachelor of Science in Financial Management*

*Minor: Accounting*

*Emphasis Area: Corporate Finance*

Deans list: Spring 2023, Fall 2023

**Clemson, SC**

May 2026

GPA: 3.20/4.00

**Bond University**

- Semester Abroad

**Gold Coast, QLD, Australia**

Jan 2024-May 2024

## RELEVANT WORK EXPERIENCE

**Equity Lifestyle Properties**

*Financial Planning Intern*

**Chicago, IL**

June 2025-Aug 2025

- Built cable budget forecasts and utilities outlier analyses by analyzing seasonal trends
- Led AI integration capstone project, interviewed 5+ departments, developed implementation plan, and delivered recommendations to executives to enhance customer service strategy
- Conducted due diligence on 30+ potential acquisition targets using qualitative criteria (Google reviews, street view, amenities), and delivered a ranked recommendation system to support strategic growth planning
- Consolidated historical investor data to calculate FAD/share, Div/share, and payout ratios, supporting investor relations
- Completed 25+ hours of Excel and Power BI training, building automated Pivot Tables and visualizations to streamline FP&A reporting

**Resource 1, Inc.**

*Finance and Human Resources Intern*

**Oak Brook, IL**

May 2023-Aug 2023

- Audited 100+ employee files and I-9 documents while identifying process gaps and recommending workflow improvements that would reduce HR processing time
- Evaluated financial impact of labor policies (Fair Labor Standards Act, Paid Leave Act) on workforce budgeting
- Compiled labor market insights on hybrid work, AI recruiting, and workforce shortages to support long-term talent strategy
- Developed a hiring and onboarding simulation with defined KPIs (time-to-hire, offer acceptance rate, retention)

## INVOLVEMENT

**Teach for America**

*Ignite Fellow*

**Remote**

August 2025-December 2025

- Selected as one of ~2,000 Teach For America Ignite Fellows nationwide to deliver virtual, targeted instruction in math, reading, or college readiness, improving academic outcomes in 95–98% of partner schools serving under-resourced K–12 communities.

**Delta Zeta Sorority**

*Active Member, Member of Bylaws Committee*

**Clemson University**

August 2022-Present, October 2024

- Contributed to national standards review and chapter compliance

**Women in Business**

*Active member*

**Clemson University**

August 2024-Present

- Engage in workshops and speaker sessions to expand finance and leadership skills

**Financial Planning Club**

*Active member*

**Clemson University**

August 2024-Present

- Explore the financial planning industry by attending guest speakers

## SKILLS AND CERTIFICATIONS

- Advanced Excel (Pivot Tables, XLOOKUP, Conditional Formatting) and Microsoft Office Suite
- Excel for Financial Planning and Analysis (FP&A) LinkedIn Learning Certification
- Bloomberg Market Concepts (BMC) Certified

# Nicole Barsoum

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## **EDUCATION**

### **Bachelor of Science in Financial Management**

*Clemson University*

Corporate Finance Emphasis

May 2026

Clemson, SC

GPA: 3.40/4.00

## **WORK EXPERIENCE**

### **Abacus Planning Group**

*Financial Planning Intern*

May – July 2025

Columbia, SC

- Organized financial data and shadowed advisors, gaining exposure to estate, tax, life insurance, and retirement planning; risk management; and international investment strategies
- Utilized industry software including Orion, Morningstar, Charles Schwab, and Ascensus to support data gathering and analysis of retirement funds
- Completed firm-wide and intern-specific training focused on professional mindset, active listening, personal growth, and core values such as confidentiality, gratitude, and adaptability

### **United States Golf Association (USGA)**

*Hospitality Department US OPEN*

June 2023 & June 2024

Los Angeles Country Club & Pinehurst Resort

- Fostered a positive experience for players and their families by anticipating needs, resolving concerns, and delivering prompt solutions in a high-pressure setting
- Collaborated effectively with a diverse team of professionals to ensure seamless event operations, adapting quickly to changes in schedule and guest needs

### **Abercrombie & Fitch**

*Sales Associate*

May 2021 – Present

Tampa, FL

- Supported merchandising and inventory management, boosted sales through excellent customer service, and processed transactions
- Refined my active listening, organization, and problem-solving skills

## **CAMPUS INVOLVEMENT**

### **Pi Beta Phi Fraternity for Women**

*Vice President of Finance and Housing*

October 2024 – Present

Clemson, SC

- Managed two directors, providing guidance to ensure alignment with goals and operational success.
- Administered a \$200,000 budget; overseeing financial planning, reporting, and expense tracking for events, philanthropy, and operations
- Led financial training for members, promoted budgeting best practices, and coordinated housing logistics and dues collection for 356 members

### **Community for Undergraduate Business Students (CUBS)**

*Leader and Mentor*

August 2023 – Present

Clemson, SC

- Attend monthly meetings, organize events, and mentor a group of first-year students
- Demonstrate leadership by creating an inclusive and engaging environment to ask questions, obtain advice from someone formerly in their shoes, and provide feedback

### **Clemson Business in Oxford Program**

*Study Abroad*

June – August 2024

Magdalen College, Oxford England

- Attended formal lectures presented by Oxford University faculty members and guests on critical issues like geopolitical risk, climate change, and international relations
- Developed a deeper understanding of global economic trends and their impacts on business strategies through coursework and real-world examples

## **ACTIVITIES & VOLUNTEER SERVICES**

**Activities:** Women in Business, Finance Club, Financial Management Association

**Volunteer:**

*Read, Lead, Achieve*

August 2022 – Present

Clemson, SC

- Collect book donations and read to 1<sup>st</sup> – 4<sup>th</sup> grade students at Six Mile Elementary School

# Colin Beucler

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## EDUCATION

**Clemson University**, Clemson, SC May 2026  
Bachelor of Science in Financial Management, Minor in Accounting  
**CEA Study Abroad**, Barcelona, Spain Spring 2025

## WORK EXPERIENCE

**Accounting Intern**, *Five Below*, Philadelphia PA Summer 2025

- Streamlined month-end close by capitalizing CIP projects in Oracle Fusion, leveraging XLOOKUP and ADFDI excel extension to upload to Fusion, reducing processing time
- Reconciled CIP and Cost export files with the Fixed Assets subledger, leveraging pivot tables, to ensure General Ledger accuracy
- Processed Accounts Payable invoices in Oracle to support timely vendor payments

**Sales and Marketing Intern**, *The Collegiate Lineup*, Tampa FL (Remote) Summer 2024

- Gained experience in client relationship building and applied marketing and sales strategies to drive product demand and increase revenue through targeted outreach
- Collaborated with team on industry analysis and strategy recommendations to increase market share
- Presented SWOT analyses to a 25 person intern class and Account Managers, strengthening presentation and business communication skills
- Recognized with the 2024 Commitment and Internship Spotlight Award for strong performance and contribution

**Accounting Intern**, *BK&I Certified Public Accountants*, Wayne PA (Project Based) 2023 & 2024

- Recorded deposits and disbursements, performed monthly bank reconciliations, as well as other general bookkeeping in QuickBooks to ensure accurate client records
- Learned how to prepare financial statements utilizing Excel

**Store Opening and Sales Associate**, *Rally House*, Springfield PA Summer 2024

- Stocked inventory and built floorplan according to corporate standards prior to store grand opening
- Assisted customers on the sales floor and at checkout to contribute to store sales goals
- Led and trained team of coworkers in building fixtures, store organization, and other store maintenance

## EXTRACURRICULAR ACTIVITIES

**Finance Club**, *Clemson University*, Clemson SC 2025-Present

**Wall Street South Investment Club**, *Clemson University*, Clemson SC 2024-Present

**Ethics Scholars Program**, *Clemson University*, Clemson SC 2024-Present

**Phi Kappa Tau (Epsilon Nu Chapter)**, *Clemson University*, Clemson SC 2024-Present

### *Philanthropy Committee*

- Organized and set up for philanthropy events, contributed logistical ideas, and collaborated with the team to ultimately increase fundraising by 65% from the prior year, setting a chapter record for dollar amount raised to benefit SeriousFun Children's Network
- Volunteered within community to help those in need

### *Merchandise Committee*

- Contributed graphic design, logistical, and cost planning ideas, resulting in 20% cost savings on merchandise for members

## INTERESTS

Intramural Sports, Golf, Skiing, Pickleball, Cars

## SKILLS

Microsoft Office Suite (Excel, Word, Powerpoint), Google Suite, QuickBooks, Bank Reconciliation, Bookkeeping, Oracle Fusion, Power BI

# ISABELLA BEVIS

Summerfield, North Carolina  
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## EDUCATION

### Clemson University

May 2026

*Bachelor of Science in Financial Management*

GPA: 3.43/4.00

- Minor in Accounting, Emphasis in Corporate Finance
- Relevant Coursework: Risk & Insurance, Investment Analysis (IP), Business Strategy (IP), International Financial Management, Financial Management I & II

## PROFESSIONAL EXPERIENCE

### Wealth Management Intern

June 2023 – Aug. 2023, June 2025 – Aug. 2025

*Cascades Capital Asset Management, L.L.C.*

Greensboro, NC

- Conducted comprehensive securities research and financial modeling to support informed investment decisions and align portfolios with market trends and client goals
- Developed and delivered investment presentations and reports that enhanced client understanding and reinforced trust in recommendations
- Utilized Charles Schwab's platform to manage and analyze portfolios, generate quarterly reports, and provide actionable performance insights
- Maintained accurate records and ensured data accessibility to optimize client experience and support strategic portfolio adjustments

### ALPFA LIFT Program Intern

June 2025 – July 2025

*Bank of America, Association of Latino Professionals for America*

Remote, USA

- Selected for the ALPFA Leadership, Innovation, and Financial Technology (LIFT) Summer Program, a nationwide 8-week business and technology experience
- Advanced as a top 9 finalist team in the LIFT Innovation Competition by delivering data-driven recommendations on loan performance, interest income, and risk to a panel of industry judges
- Strengthened technical expertise through hands-on training in Alteryx, Tableau, and Advanced Excel for financial analysis and reporting
- Built industry connections through professional development workshops, mentorship, and coaching from senior banking professionals and executives

## CLUBS & ACTIVITIES

### Vice President of Equity & Inclusion

Aug. 2023 – May 2026

*Association of Latino Professionals for America at Clemson University*

Clemson, SC

- Strengthened chapter inclusivity by collaborating with campus organizations and the College of Business to implement initiatives that promoted belonging across the community
- Advised chapter leadership on inclusive strategies, ensuring fair recruitment while actively working to prevent bias and microaggressions
- Expanded responsibilities by incorporating ALPFA Clemson alumni engagement to broaden career development opportunities and strengthen professional pipelines
- Led alumni engagement strategy by merging chapter responsibilities with alumni relations to sustain long-term organizational growth and student success

## SKILLS

- Languages: English (Native), Spanish (Proficient)
- Certifications: Bloomberg Finance Fundamentals
- Technical: Microsoft Excel, Tableau, Power BI, Bloomberg Terminal, Microsoft Office Applications, Alteryx, Microsoft Access, Microsoft Visio, ERP – NetSuite and Process Mining

# Turner Bishop

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## Education

**Clemson University, Powers College of Business**

GPA: 3.81/4.00

*Bachelor of Science in Financial Management, Emphasis: Financial Planning*

May 2026

*Bachelor of Science in Economics*

May 2026

**Umbria Institute**

*Study Abroad, Perugia, Italy*

Summer 2024

## Experience

**Clemson Department of Operational and Institutional Excellence**

Clemson, SC

*Summer Enterprise Risk Management Intern*

Summer 2025

- Developed AI-driven risk models (Quid) to identify emerging trends across university operations, enhancing efficiency and scalability of quarterly risk reports
- Introduced new operational risk metrics and user interfaces to the university's operational risk register, improving usability and supporting leadership's decision-making

**Duncan Williams Asset Management**

Memphis, TN

*Asset Management Intern*

Summer 2024

- Built Excel database of approximately 350 asset management firms to support management's M&A decisions
- Processed client onboarding, broker-dealer change requests, IRA applications, Schwab MoneyLinks, and other client documentation ensuring compliance and supporting advisor efficiency
- Collaborated with financial advisors on portfolio servicing and client transitions, facilitating the retention and operational integration of a newly acquired group of accounts onto the Schwab and MS Howells platforms

**Bishop Pressure Washing Services**

Memphis, TN

*Founder and Owner*

Summer 2020 – Summer 2024

- Established and scaled a seasonal pressure washing business to 130+ recurring clients, generating \$12,000 in seasonal revenue, and maintaining a minimum 10% YoY growth in client base
- Developed customer relationship management system to optimize repeat business and manage accounts receivable using Excel, PayPal, and Square

**Rotolo's Pizza**

Memphis, TN

*Waiter*

Summer 2023 – Summer 2024

- Served as food runner, host, and waiter developing interpersonal communication and time management skills
- Trained 15+ new front-of-house staff during new franchise launch

## Leadership Experience

**Clemson University Guide Association**

Clemson, SC

*University Tour Guide*

Fall 2022 – Present

- Lead weekly tours of 25+ prospective students and families, refining public speaking and presentation skills
- Manage front desk operations at Clemson's visitor center, including tour scheduling, and guest check-in

**Alpha Phi Omega – Gamma Lambda Chapter**

Clemson, SC

*Treasurer*

Fall 2023 – Spring 2024

- Planned 14 chapter fundraising events across two semesters to fund our service and fellowship programs
- Headed the finance committee of 12 members in the planning of chapter spending, fundraising, and endowment withdrawal decisions; secured an additional \$30,000 in funding from Clemson's Student Funding Board
- Prepared a semesterly budget of \$20,000 to direct and manage chapter spending and the chapter's bank accounts

*Bylaws Chair*

Fall 2024 – Spring 2025

- Led the Bylaws committee of 8 brothers and represented the committee on the executive council
- Reviewed and revised the chapter's bylaws to enhance efficiency and productivity

**Honors:** Clemson University President's List, Clemson University Dean's List, Alpha Phi Omega Brother of the Year, Alpha Phi Omega Distinguished Service Certificate

**Affiliations:** Economics Student Advisory Board, Clemson Financial Planning Association, Clemson Blockchain, Clemson Finance Club

# SARA BONIFACIO

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## EDUCATION

<b>Clemson University, College of Business</b> <i>Bachelor of Science in Financial Management</i> <i>Minor: Accounting, Emphasis: Corporate Finance</i> Cumulative GPA: 3.27/4.0	<b>Clemson, SC</b> May 2026
<b>Instituto Lorenzo de' Medici</b> <i>Study abroad program with an emphasis on international business and marketing</i>	<b>Florence, Italy</b> January 2024 - May 2024

## WORK EXPERIENCE

<b>Altus Group</b> <i>Customer Operations Data Analyst Intern (6- week hybrid program)</i> <ul style="list-style-type: none"><li>Developed and delivered 7 strategic prospect lists (totaling 1,412 leads) for Q3 outreach using Salesforce, ZoomInfo, and LinkedIn Sales Navigator</li><li>Conducted in-depth research and data analysis to identify high-value targets, directly contributing to the creation of 5 new sales opportunities</li><li>Streamlined and cleaned lead data in Excel to improve data accuracy and efficiency across the company's outreach and reporting processes</li></ul>	<b>New York, New York</b> June 2025 - July 2025
<b>Oyster Bay Main Street Association</b> <i>Financial Development Intern</i> <ul style="list-style-type: none"><li>Improved budgeting and accounting processes by accurately tracking and categorizing income and expenses, enhancing financial visibility and control</li><li>Prepared comprehensive budgets for multiple events and committees, supporting effective financial planning and expenditure management</li><li>Conducted in-depth market research and developed targeted acquisition campaigns, successfully onboarding 8 new business members and increasing revenue streams</li></ul>	<b>Oyster Bay, New York</b> May 2025 - Present
<b>Sagamore Junior Sailing</b> <i>Head of Operations</i> <ul style="list-style-type: none"><li>Monitored and managed enrollment for a 10-week sailing program overseeing 125 children.</li><li>Coordinated and led daily staff meetings, supervised teams of instructors, and ensured safety protocols were followed.</li><li>Designed lesson plans, implemented new activities, and provided instruction to different skill levels of children ages 8-16.</li></ul>	<b>Oyster Bay, New York</b> Summer 2024

## LEADERSHIP EXPERIENCE

<b>Raynham Hall Museum   Founder and Chair of the Slavery Memorial</b> <i>A memorial honoring the unmarked graves of enslaved individuals</i> <ul style="list-style-type: none"><li>Designed and presented a slavery memorial honoring enslaved individuals to the Museum's Board of Trustees, securing preliminary approval and raising \$10,000 for project development</li><li>Led collaboration with local and state officials to obtain site approval, address legal requirements, and ensure compliance for successful memorial installation</li></ul>	<b>Oyster Bay, New York</b> November 2021 - April 2023
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## SKILLS, ACTIVITIES & INTERESTS

- Skills:** Microsoft Excel, Salesforce, PowerBI
- Activities:** Wall Street South Investment Club, Finance Club, Women in Business
- Interests:** Running, Traveling, Sailing

# Alexander Bowles

(571)-299-9725 - [ajbowles3@gmail.com](mailto:ajbowles3@gmail.com) - <https://www.linkedin.com/in/aj-bowles/>

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## Education

**Clemson University** – College of Business

Fall 2022 - Spring 2026

*Bachelor of Science in Financial Management*

GPA: 3.33/4.00

*Minor: Accounting, Emphasis: Corporate Finance*

## Experience

**Clemson Formula SAE**, Clemson, SC

Fall 2024 - Present

*Business Division Member*

- Crafted the 2026 fiscal year FSAE financial sheet
- Writing official documents and guidelines for the club's business division.
- Created photo and media content to promote the team and attract sponsors.
- Helped develop promotional materials and keep a consistent brand style.

**Uber Eats**, Great Falls, VA

June - August 2025

*Delivery Driver*

- Part time work, 20+ hours per week
- Achieved a 94% satisfaction rate with professional customer service and communication.
- Maintained an on-time delivery rate of 96%, as well as a cancellation rate of less than 1%.
- Completed over 175 different trips with zero safety incidents.

## Projects

**Equity Valuation Project - Microsoft Excel**

Spring 2025

- Built a dynamic stock valuation model to evaluate the intrinsic value of Home Depot stock.
- Integrated five methods for a comprehensive evaluation of the intrinsic value, including the dividend discount model, P/E, Price-to-Cash Flow, Price-to-Sales, and Price-to-Book ratios.
- Incorporated real world, multi-year data from value line to more accurately forecast earnings, cash flows, and dividends.

**Investment Portfolio Analysis Project - Microsoft Excel**

Spring 2025

- Developed and managed simulated Roth IRA and Traditional IRA portfolios with diversified allocations of equity.
- Conducted a 5-year performance example, including before and after tax performances between different portfolios.
- Applied financial modeling tax impacts and implications, as well as calculation for return to evaluate, compare, and contrast investment strategy.

**Website Development Project at Yext**, Arlington, VA

Spring 2022

- Developed and published a personal website using Yext's platform.
- Interacted with industry professionals to learn about careers and company culture.

## Skills

Proficient in Excel and Tableau for data analysis, visualization, and reporting.



# Luke Breci

(864)438-6064 | [lbreci@g.clemson.edu](mailto:lbreci@g.clemson.edu) | Greenville, SC

## Education

<b>Clemson University, College of Business</b>	<b>Clemson, SC</b>
<i>Bachelor of Science in Financial Management</i>	May 2026
<i>Minor: Accounting, Emphasis: Investment Banking</i>	
Cumulative GPA: 3.7/4.0, Major GPA: 3.8/4.0	
<ul style="list-style-type: none"><li>Screened and analyzed securities in the Information Technology sector and provided picks to the Clemson Investment Fund that have shown positive performance.</li><li>Outperformed my peers and the market in a semester long investment competition using my understanding of security analysis, stock screening, and industry selection.</li></ul>	

## Certifications

<b>Certified Scrum Master (ScrumAlliance)</b>	Active: July 2024 – July 2026
<b>Chartered Financial Analyst (CFA) Level 1 Candidate</b>	Exam Date: May 2026

## Work Experience

<b>Spindle Tree Racquet Club</b>	<b>Seneca, SC</b>
<b>Tennis Coach</b>	July 2024 - Present
<ul style="list-style-type: none"><li>Coached junior players to improved roster spots on their high school teams.</li><li>Maintain and manage a client base and coach members of all ages. Work with players to improve their National Tennis Rating Program rating or Universal Tennis Rating.</li></ul>	
<b>Larkin's at Camperdown</b>	<b>Greenville, SC</b>
<b>Server's Assistant</b>	May 2025 – August 2025
<ul style="list-style-type: none"><li>Provided hands-on support for servers at the high-end dining establishment in downtown Greenville.</li><li>Ensured that customer needs were seen to and acted as a liaison between diners and servers.</li></ul>	
<b>Greenville Country Club</b>	<b>Greenville, SC</b>
<b>Tennis Pro Shop Attendant</b>	May 2023 – August 2023
<ul style="list-style-type: none"><li>Oversaw day-to-day operations of the tennis pro shop</li><li>Effectively managed merchandise and inventory</li><li>Reconciled cash and credit transactions at the end of each workday</li></ul>	

## Leadership Experience

<b>Tennis Club</b>	<b>Clemson, SC</b>
<b>Tournament Coordinator</b>	April 2024 – April 2025
<ul style="list-style-type: none"><li>Organized charity pickleball tournament and raised over \$1,000 for colon cancer research/treatment</li><li>Recruited over 50 new members into Clemson Club Tennis during my time on the executive board</li><li>Worked with fellow executive members to streamline the club's operations and enhance the election process</li></ul>	

## Awards, Interests, Skills

### Awards

- Clemson University President's List - Fall 2022, Fall 2024
- Clemson University Dean's List – Fall 2023, Spring 2024, Spring 2025

### Skills

- MS Office (Expert level proficiency with Microsoft Excel), PowerBI, Tableau, Python, SQL
- Teamwork, Dynamic learning, Communication, Time management

### Interests

- Tennis Club, Golf, Reading, Writing, Finance Club, Clemson Stock Pitch team

# Trinity Broach

trinitybroach04@gmail.com | (803) 537-1404

<https://www.linkedin.com/in/trinity-broach>

## EDUCATION

### Bachelor of Science in Financial Management

May 2026 | Clemson, SC

*Clemson University – Wilbur O. and Ann Powers College of Business*

Minor: Accounting - Emphasis: Financial Planning

Partnered Trading Simulation | *Investment Analysis Class*

September – November 2024

- Collaboratively managed a simulated stock portfolio, achieving a 16.27% return over 2 months.
- Conducted stock market research and presented an analytical final report on our investments and growth.

## EXPERIENCE

### Assistant General Manager

May 2024 – Present | Clemson, SC

*Sole on the Green*

- Oversee customer-facing operations in the hospitality setting, focusing on customer experience, staff management, and daily operations of the restaurant.
- Supervise and build weekly schedules for 40+ front of house employees.
- Oversee daily cash handling and biweekly payroll review
- Assist in interviews, hiring, and onboarding training to reduce turnover and maintain a dependable team.
- Resolved staff and customer conflicts/complaints with professionalism on a consistent basis.

### Server

August 2022 – May 2024 | Clemson, SC

*Sole on the Green*

- Answered questions regarding menu items and assisted customers in having a positive dining experience.
- Handled cash, credit card, and split payments with accuracy.
- Resolved any guest concerns and complaints with professionalism to encourage repeat business.
- Adhered to health, safety, and sanitation standards.

### Sales Representative

May – August 2022 | Columbia, SC

*BroCo Solar*

- Presented products to prospective customers, while outlining and answering questions regarding the benefit of Solar Energy to homeowners.
- Managed positive customer relationships and set appointments for individual household assessment for Solar Panel installation.
- Consulted manager on solar energy pricing and savings based on individual household energy use and costs.

## CAMPUS INVOLVEMENT

Member | *Delta Delta Delta*

August 2023 – Present

Member | *Clemson Finance Club*

August 2024 – Present

## TECHNICAL SKILLS

Financial Modeling | Excel | Bloomberg | Financial Reporting | Accounting Fundamentals |

# Abraham A. Cagle

| abecagle@gmail.com | | (404) 932-9455 | [Abraham Cagle](#) | [LinkedIn](#)

## Education

**Clemson University, College of Business**  
*Bachelor of Science in Financial Management*  
*Minor: Accounting, Emphasis: Financial Planning*

- Cumulative GPA: 3.1/4.0

**Clemson, SC**  
December 2025

## Work Experience

**The Piedmont Group** **Atlanta, GA**  
*Financial Advisor & Wealth Management Intern* Summer 2024

- Worked on portfolio and plan projections with CFPs to create tailored financial plans to address client needs and wants; participated in client meetings with advisors on insurance, retirement, investment, and risk planning topics.
- Analyzed financial statements of clients to implement various recommendations using financial software: Advisor360 & Monte Carlo Analysis to provide different savings strategies for long-term & short-term goals.
- Worked alongside two financial planners with onboarding & launch, 10 new clients within three months, performing capital needs analysis through initial portfolio gathering & implementation.
- Performed market research on different investment instruments with in-house investment managers. Research included: Market risk, the effects of monetary policy and fiscal policy, and the calculation of investor returns with their given risks

**Timothy J Cagle, CPA, PC Financial Management** **Alpharetta, GA**  
*Financial Management Intern* August 2024 – August 2025

- Analyzed and reviewed the corporate and personal tax returns of clients and companies alongside CPAs & Planners
- Entered data information on ATX software for basic 1040 returns; shadowed under office admins to enter company payroll into QuickBooks software systems for each quarter.
- Collaborated with CPAs concerning projections of personal, estate, and retirement tax strategies through Excel and basic financial statements

## Leadership Experience

**Vice President of the C.L.A.Y Foundation** June 2022 - Present

- Oversee and track the implementation of the financial and strategic objectives of this 501(c)3 organization dedicated to assisting children in crisis with food security, medical costs, and short-term financial support

**Risk Management Chairman – Phi Kappa Tau Fraternity, Epsilon Nu** Fall 2022 – Fall 2024

- Monitoring & facilitating chapter events with risk prevention safety plans approved by Clemson IFC Council
- Educated chapter brotherhood on risk prevention topics, maintained the highest chapter safety rating

## Activities, Awards, and Certifications

**Awards:** High School All-American (Baseball) 2019,2020,2021

**Certifications:** Clemson Tableau Desktop Specialist Badge {Issued Apr 2025}, Georgia State Health, Life, & Variable Life Insurance

**Activities:** NHS, NSHSS, Phi Kappa Tau Fraternity, Wall Street South Investment Club, Clemson Finance Club, Fellowship of Christian Athletes

## Skills

Accounting tax software	Financial, Retirement, and Estate Planning	Bloomberg Terminal Analysis
Public Speaking	Investment Management Research	Advisor 360 & Monte Carlo
Financial Risk Management	Portfolio Research	Power BI & Tableau
Financial Analysis	Microsoft Office – Excel, PowerPoint	Power Query Cleaning

# Cross Canady

2848 Wheelock Rd • Charlotte, NC 28211 • cmcanad@clemson.edu • 704-778-5088

## EDUCATION

**Clemson University – Clemson, SC**

**Clemson, SC**

*Bachelor of Science in Financial Management*

May 2026

*Minor: Accounting, Emphasis: Corporate Finance*

- Dean's List | GPA: 3.65/4.0
- Finance Club, Wall Street South Investment Club, Investment Banking Club, and Beta Alpha Psi

## WORK EXPERIENCE

**E15 Group**

**Chicago, IL**

*Business Analyst*

June – August 2025

Developed a reporting tool for Amazon used to monitor unit-level margin performance.

- Built margin reporting for product sales, providing visibility into profitability by product category and location
- Standardized performance metrics and developed dashboards used to evaluate financial impact and support data-driven decision-making
- Worked with net sales, COGS, and compliance data to identify key drivers of margin variance and operational inefficiencies
- Documented processes and designed tools to be scalable across product categories and building types for continued internal use

**Robora Financial**

**Charlotte, NC**

*Financial Analyst*

July – August 2024

Worked across all lines of business during product go-to-market and post-seed round equity raises.

- Work directly with CEO and former national bank executive as the company executed its initial product launch
- Developed cash flow and valuation models for investor presentations and diligence
- Segmented the \$19 trillion U.S. deposit market by yields to customers, identifying \$11 trillion at depressed rates
- Demographic research of large cash balance entities and areas

**Parking Management Company | The Quinte Oyster Bar**

**Charleston, SC**

*Valet Attendant/Bellman | Food Runner*

June – August 2023

Held two separate jobs to maximize savings and self-dependence.

- Provided luxury hotel auto and baggage services to guests
- Demonstrated customer management and interpersonal skills, being selected for highest volume shift
- Delivered food orders to customers in high paced environment
- Cleared and managed table needs, supporting wait staff, and completed post-closing cleaning duties

## CERTIFICATION

**FMC® Level I Certification from Adventis**

- Built a three-statement, fully circular and formatted financial model from scratch in under 90 minutes
- Scored greater than 90% on a multiple-choice exam covering key concepts in financial modeling, accounting, and corporate finance

## ADDITIONAL INFORMATION

LdM The Italian International Institute Study Aboard 2024 • Excel and Microsoft Proficient • Beta Theta Pi Member • Avid Basketball and Water-Skiing Enthusiast • Strong Work Ethic

# Kevin Carmichael

860-212-7143 | [kcarms7@gmail.com](mailto:kcarms7@gmail.com) | [www.linkedin.com/in/kevin-r-carmichael](https://www.linkedin.com/in/kevin-r-carmichael)

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## Education

### Bachelor of Science in Financial Management

Clemson University, Honors College

Minor: Accounting; Finance Emphasis: Commercial Banking and Investments

May 2026

Clemson, SC

GPA 3.90/4.00

## Professional Experience

### Commercial Banking Internship

Webster Bank

Summer 2024

Hartford, CT

- Supported execution of \$5M–\$50M commercial loan transactions, collaborating with relationship managers, private equity firms, and syndicate banking partners to structure credit facilities
- Designed and implemented a portfolio “trend card” tracking system, improving visibility into client performance and strategic initiatives across Environmental Services and Aerospace portfolios
- Built and reviewed financial models for sector-specific clients, incorporating revenue forecasts, margin analysis, and scenario testing to support credit decisioning
- Enhanced risk management processes by updating annual credit reviews in Sageworks and Excel, ensuring compliance with underwriting standards and regulatory requirements

### Peer Assisted Learning Leader

Clemson University

January 2024 – May 2024

Clemson, SC

- Developed and conducted interactive tutoring sessions on a weekly basis for 5-30 students enrolled in introductory accounting classes
- Utilized effective communication and people skills to create a supportive learning environment which fostered comprehension and confidence in accounting topics

## Other Experience

### Teacher's Assistant

West Hartford Public Schools

Summer 2025

West Hartford, CT

- Led instructional activities for special needs students, customizing lessons to accommodate individual learning abilities and goals
- Provided firsthand support and fostered a nurturing environment that encouraged student participation

### Catering and Vending Team Member

Bear's Smokehouse BBQ

Summer 2023

Hartford, CT

- Assisted with food preparation, transportation, serving, and clean up for private catering occasions, concerts, and sporting events (50 – 7000 guests)

## Activities and Honors

### CFA Level 1 Candidate

Exam Scheduled for August 2025

- CFA Level I candidate with 200+ study hours completed, covering financial reporting, equity valuation, fixed income, and ethics
- Completed real-world mock financial modeling simulation, applying valuation, forecasting, and analysis techniques to practical scenarios

### Wall Street South Investment Club - Clemson University

August 2024 - Present

- Conduct market analysis and strategically allocate capital by buying and selling stocks

# Lucas Carter

Charleston Metropolitan Area, SC | (347) 510-8789 | lucjc2022@gmail.com

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## EDUCATION

**Clemson University, Wilbur O. and Ann Powers College of Business | Graduating May 2026**

*Bachelor of Science in Financial Management, Accounting Minor*

*Emphasis: Commercial Banking and Investments*

Cumulative GPA: 3.67/ 4.0

**Clemson University Honors College**

*Admitted Spring 2023 | 2023-Present*

- Must maintain a minimum 3.5 GPA while completing required supplemental honors level courses

## **Certifications:**

FINRA SIE | Bloomberg Market Concepts (BMC)- expected Fall 2025

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## EXPERIENCE

### **Jones Trading Institutional Services**

*Institutional Trading Intern, Daniel Island, South Carolina | June 2025-August 2025*

- Engaged in institutional brokerage services including outsourced trading, sales trading, derivatives, and fixed income
- Developed and presented a final project that required financial analysis of a hedge fund portfolio, share volume research, and a deep understanding of both Jones Trading products and client suitability
- Shadowed the real-time activities of agency traders with an average trading experience of 20 years

### **SnapTrade Investment API**

*Client Relations Intern, Remote | October 2024-January 2025*

- Performed in-depth research on brokerages to analyze competitive positioning and market opportunities
- Participated in business calls with potential partnerships, gaining insights into client acquisition, relationship management, and the sales process in the finance and technology sectors
- Managed client outreach initiatives, generating relationships via targeted communication and follow-up

### **Premier Senior Placement Services (PSPS)**

*Sales Associate/ Care Coordinator Intern, Phoenix, AZ, 85024 | May-June 2022*

- Applied sales skills and research, analyzing multiple data points and success criteria, to place clients and optimize senior living situation
  - Cold-marketed services to hospitals and nursing facilities resulting in an expansion of business network
- 

## ACTIVITIES & VOLUNTEERING

### **Activities**

- |  |  |
|--|--|
| • Finance Club   2025-Present                | • Track   2018-2023  Captain 2021-2022 |
| • Brother of Phi Delta Theta   2022-Present  | • Investment Club   2020-2022          |
| • Spire Society Leadership Group   2019-2022 | • Football   2018-2021                 |

### **Volunteer Service**

- KCC School Cambodia | Teaching and Construction | 2024-2025
  - Phi Delta Theta ALS fundraising | 2022-Present
  - Our Lady Star of the Sea Parish | 2018-2024
- 

## SKILLS

- |                       |                            |                        |
|-----------------------|----------------------------|------------------------|
| • Independent Leader  | • Informative Communicator | • Analytical Reasoning |
| • Sales and Marketing | • Collaborative Worker     | • Client Relationships |

**Andrew Champagne**  
(206)-747-1883  
andrewchampagne44@gmail.com

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## **EDUCATION**

CLEMSON UNIVERSITY	Clemson, South Carolina
<i>Wilbur O. and Ann Powers College of Business</i>	
Bachelor of Science in Financial Management	
Minor in Accounting	May 2026
Concentration in Real Estate	GPA: 3.95/4.0

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## **WORK EXPERIENCE**

UNITED WHOLESALE MORTGAGE	Pontiac, Michigan
<i>Intern</i>	May 2025 – August 2025

- Assisted AVP of Sales in management of 50 Account Executives including deriving insights from Salesforce data analyzed through Excel and Power BI
- Analysis of historical market conditions to provide selling points for different mortgage products, information was used in presentation in front of 1000 salespeople and brokers
- Shadowing and discussions with many business lanes including finance and capital markets

BLACKWOOD HOMES LLC	Seattle, Washington
<i>Laborer</i>	May 2023 – August 2023

- Construction laboring, driving, reporting of construction progress, and cleaning of units
- Working without direct supervision
- Communicating with many foremen, contractors, and in English and Spanish

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## **ACTIVITIES**

- **Member of the J. Daniel and Nancy Garrison Sales Innovation Program at Clemson University** – A competitive program involving intense study and practice of professional and sales development skills. Interacting with industry leaders and studying with like minded peers.
- **Clemson Community for Undergraduate Business Students(CUBS) Executive Leader and Mentor**– Organizing and assisting in events for new business school students, as well as offering mentorship and leading small groups
- **Campaign Manager for Grey Riley For Council**- Formulated and discussed strategy, responding to local press, creation of advertisements, and research into opponents
- **Participant in Stock Pitch Research Creative Inquiry**



# Steven C. Chapman

(240-810-3783) | Steven.Chapman3012@gmail.com | www.linkedin.com/in/steven-chapman-b635b0255/

## EDUCATION

**Clemson University** | Clemson, SC

May 2026

*Bachelor of Science in Financial Management and Accounting*

GPA: 3.54/4.0

- 2x Dean's List student

**Georgetown Preparatory School** | North Bethesda, MD

May 2022

*Highschool Diploma*

GPA: 92/100

- 2x Dean's List and 5x First Honors student

## PROFESSIONAL EXPERIENCE

**Frank, Rimerman + Co. LLP** | San Jose, CA

May 2025 - July 2025

*Rotational Accounting Intern*

- Rotated through four departments (STI Tax, Venture Capital Tax, Venture Capital Audit, and Corporate Audit), gaining a broad understanding of public accounting practices across tax and audit functions.
- Prepared and reviewed tax documents including 1099 forms and Schedule K-1s, and conducted tax research related to individual and partnership reporting.
- Collaborated on audit testing procedures including rollforwards and risk assessments for venture capital and private company clients, simulating client interactions and documentation requests.
- Delivered multiple group presentations to firm professionals, including a risk assessment project and a competitive analysis of venture capital firms, demonstrating research, communication, and public speaking skills.

**Smart Investment** | Valencia, Spain

June 2024 - July 2024

*Summer Intern*

- Assisted in identifying high-potential investment opportunities in premium tourist areas, contributing to the company's reputation for efficiency and profitability.
- Conducted financial analyses of hotel properties, evaluating their efficiency and economic viability to provide detailed insights for potential investors to CEO Rafa Serrano.
- Collaborated with a multilingual team, enhancing communication and marketing strategies for hotel acquisitions and sales, catering to international investors.

**Harken Capital** | Bethesda, MD

August 2023 - December 2023

*Fall Intern*

- Reviewed and summarized offering materials of PE and VC firms with Co-Founder Fred Malloy.
- Conducted background research on fund investors, companies, and niche industries with other interns and assessed key risks and profitability.
- Gained valuable experience working within a specific industry, applying learned concepts directly into relevant work situations.

## CAMPUS INVOLVEMENT

**Scholars of Finance (SOF)** | Clemson, SC

February 2024 - Present

- Attend weekly Leadership development meetings to collaborate with fellow candidates and other leaders within SOF as well as complete the leadership development program modules.

**Community for Undergraduate Business Students (CUBS)** | Clemson, SC

August 2022 - May 2023

- Selected through a rigorous application process to a prestigious living and learning community for freshman business students.

**Alpha Sigma Phi Fraternity** | Clemson, SC

September 2022 - May 2023

*Executive Member*

- Host weekly leadership development meetings for members.

**Wall Street South Investment Club** | Clemson, SC

August 2024 - Present

- Managing a \$100K mock portfolio through stock picking and portfolio diversification strategies.

## SKILLS/CERTIFICATIONS

- **Certifications:** Bloomberg Finance Fundamentals, Bloomberg Market Concepts
- **Technical Skills:** Proficient in Microsoft 365, Microsoft Excel (Advanced), Data Analysis, Power BI, Tableau
- **Financial Skills:** Financial Accounting, Managerial Accounting, Cost Accounting, Financial Statement Analysis
- **Soft Skills:** Excellent Oral Communication, Presentation Skills, Critical Thinking, Problem-Solving
- **Interests:** Travel, Golf, Entrepreneurship

# Robert Connell

rbconne@g.clemson.edu | (816) 461-9291 | 825 W 56<sup>th</sup> St | Kansas City, Missouri 64113

## Education

### **Clemson University, College of Business**

Bachelor of Science in Financial Management

Minor: Legal Studies; Emphasis: Corporate Finance

Cumulative GPA: 3.2/4.0

**Clemson, SC**

December 2025

### **University of New Haven**

CEA Study Abroad Program: Barcelona, Spain

January 2024-April 2024

## Work Experience

### **Seaboard Corporation**

Finance Department Intern

**Merriam, KS**

Summer 2024

- Drafted and presented a report on Mineral Technologies Inc. to the CEO and Senior VP to see if it was a company worth merging with.
- Researched cold storage companies, REITs, key aspects of the countries Seaboard operated in, and recommended investment options
- Verified the 2<sup>nd</sup> quarter financial reports for clarity and completeness under my supervisor

### **Unlimited Logistics**

Freight Broker Intern

**Kansas City, MO**

Summer 2025

- Along with Team 1, negotiated and arranged the transportation of 20+ loads a day for multiple customers, including Smithfield, National Beef, and Associated Wholesale Grocers
- On call 24/7 in case there was a problem with the truck, the truck driver not getting to the appointment on time, drivers needing EFS codes for lumpers, etc.
- Talked with customers and the accounting department to rectify problems associated with damages and shortages

### **Garozzo's**

Waiter

**Overland Park, KS**

Summer 2021, 2022

- Provided excellent customer service to 50+ customers each night by anticipating guests' needs and responding promptly
- Maintained a professional demeanor under pressure while managing challenging situations involving dissatisfied customers.
- Carried out opening, closing, and shift change duties to keep the restaurant working efficiently and ready to meet customer needs.

## Leadership Experience

### **Kansas City Jr. Blues Rugby Club**

Captain

**Kansas City, MO**

Spring 2021

- Helped grow the team from 8 players to 20+ players after having my junior season canceled due to COVID
- Finished 7th overall at the Boys High School Nationals (Tier II level)

## Activities

- **Activities:** Clemson Rugby Team (Fall 2022), Finance Club, Intramural Sports

# Timothy Cooper Jr.

Clemson, South Carolina

248-320-3907

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Personal: [Tcoops222@gmail.com](mailto:Tcoops222@gmail.com)

Linkedin: [linkedin.com/in/timothy-cooper-jr](https://www.linkedin.com/in/timothy-cooper-jr)

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## PROFESSIONAL SUMMARY

Senior at Clemson University majoring in Financial Management with a minor in Accounting (GPA: 3.73). Experienced in wealth management, tax-efficient retirement planning, investment research, and financial literacy education. Graduating in May 2026 and eager to relocate to a leading financial hub to contribute effectively from day one.

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## EDUCATION

### Clemson University, College of Business

*Bachelor of Science in Financial Management*

*Minor: Accounting, Emphasis: Financial Planning*

GPA: 3.73/4.0

Clemson, SC

May 2026

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## RELEVANT WORK EXPERIENCE

### Harbor Private Wealth | Raymond James, Birmingham, MI

*Wealth Management Branch Intern, Summer 2025*

- Built Excel models optimizing Social Security claiming strategies to minimize IRMAA brackets and maximize client retirement income; ultimately helping to create a lifetime wealth projection.
- Researched ETFs using technical analysis, Morningstar metrics, and correlation to support portfolio construction.
- Attended client and wholesaler meetings, gaining exposure to portfolio design, tax planning, and client relationships.

### Raymond James, Birmingham, MI

*Financial Advisor Intern, Summer 2024*

- Analyzed 50+ mutual funds using financial ratios, Morningstar data, and management reviews to recommend client investment opportunities.
- Assisted in creating projections, asset allocation models, and retirement planning scenarios using Excel and Google Teams.
- Conducted equity research to align stock opportunities with client financial goals, risk tolerance, and market outlook.

### International Stars 501(c)(3) (Nonprofit), Detroit, MI

*Volunteer/ Director's Assistant November 2022- June 2023*

- Secured \$10,000+ in local and state grants, strengthening organizational funding and expanding community programs.
- Managed donor information via Excel, improving efficiency of contribution tracking and donor relations.

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## LEADERSHIP

### Ripple of One (Nonprofit), Easley, SC

*Financial Coach/ Volunteer, Jan 2025 – May 2025*

- Led weekly financial literacy workshops for underserved youth, teaching money management, saving, budgeting, and goal setting.
- Designed interactive lessons simplifying complex financial concepts into actionable decision-making tools.

### Ripple of One (Nonprofit), Pendleton, SC

*Big Brother, February 2025 – Present*

- Mentor 14-year-old younger “brother” Juelez. This includes weekly visits where I find activities for us to do together.

### Wall Street South Investment Club, Clemson, SC

*Participant- Fall 2024- Present*

- Simulated investment strategies and competed in virtual portfolio management challenges as a team.

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## HIGHLIGHTED SKILLS, INTERESTS, AND AWARDS

- Bloomberg Finance Fundamentals & Bloomberg Market Concepts certified.
- Advanced Excel Modeling and SQL.
- Modeled T-shirts for TigerTown Graphics to use for marketing.
- Dean's list (4.0 GPA) -2023 and Spring 2025.
- Completed two 10-day silent Vipassana meditation courses, practice daily mindfulness meditation.
- Made states in Giant Slalom ski racing.
- An optimistic golfer and problem solver.

# Jacqueline Cottini

914-907-6625 jmcotti@clemson.edu www.linkedin.com/in/jacqueline-cottini

## EDUCATION

### Clemson University

*Bachelor of Science in Financial Management*

*Minor: Accounting, Emphasis: Real Estate*

Clemson, SC

May 2026

GPA: 3.55/4.00

## WORK EXPERIENCE

### MOXFIVE

Remote

*Cybersecurity Operations Intern*

June 2025-August 2025

- Prepared and validated system data to ensure accuracy and completeness prior to a large-scale system migration
- Conducted daily audits of incident response activities to ensure compliance with organizational standards
- Documented daily audit findings in Excel to create reports
- Developed and maintained key partner and client contact lists to support incident response coordination

### Berkley Cyber Risk Solutions

New York, NY

*Cyber Insurance Underwriting Intern*

May 2025

- Gathered, organized, and analyzed data of 121 insured accounts to assess the risk exposure for Tech E&O insurance
- Analyzed files, claims history reports, and other documentation to identify risk factors that influenced underwriting decisions for Tech E&O insurance
- Performed a loss ratio analysis based on client specific data to evaluate the riskiness of offering Tech E&O insurance coverage
- Delivered a final presentation to the underwriting team with my recommendations and findings

### J Peters Grill & Bar

Murrells Inlet, SC

*Hostess*

May 2024-July 2024

- Greeted an average of 200 customers per day and escorted them to their tables
- Communicated with managers and customers to promptly address any concerns and issues
- Assisted servers by helping bus tables and deliver food

### The Tanning Hut

New Windsor, NY

*Sales Associate*

March 2021-Present (Seasonal)

- Assisted the owner with financial record keeping, tracking inventory, and restocking
- Balanced the cash register at the end of each shift
- Team leader responsible for training 5 new employees

## VOLUNTEER EXPERIENCE

### Our Lady of Fatima

Plattekill, NY

*Food Pantry*

January 2022-December 2022

- Assisted 50+ people in need with selecting groceries/household items and helped load them into their vehicles
- Restocked groceries and other supplies as needed
- Took inventory for grocery items

## CAMPUS INVOLVEMENT

*Women in Business*

January 2023-Present

*Finance Club*

August 2024 - Present

*Real Estate Club*

January 2024-Present

*Stock Club*

September 2024-Present

# Christian Cruz

ccruz@clemson.edu | 704-604-7417

## EDUCATION

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**Clemson University:** Wilbur O and Powers College of Business.

*Bachelor of Science in Financial Management and Accounting*

*Emphasis: Commercial Banking and Investments*

Financial Management Departmental Honors

Clemson Honors College

CEA CAPA Study Abroad Barcelona

Graduation May 2026

GPA 3.4

May – August 2024

## Investment Research Projects

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### PortFolio Theory and Management

*February 2025 – April 2025*

Performance of Hedge Fund Sectors in Diverging Rate Environments

- Conducted an honors research project analyzing six different hedge fund sectors' sensitivity to interest rate changes, using HFR index data, Sharpe ratios, and regression models to assess performance across monetary policy cycles from 2008-2024.

### Small & Mid-Cap Financial Analysis

- Evaluated 28 small- and mid-cap financial firms using a tiered screening framework based on metrics like P/E, PEG, ROA, EPS growth, and debt/equity; used a Bloomberg Terminal and Morningstar to identify three high-conviction investment recommendations and present to the CIO of the Clemson Student Investment Fund.

## EXPERIENCE

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### Event Sales Intern | Sports Promotions Group (Sports Endeavors)

*Hillsborough, NC: May–August 2025*

- Acted as a liaison between consumers and leading sports brands, enhancing brand engagement and driving product interest at events.
- Collected, tracked, and analyzed data from retail events to inform business decisions for future budgets.
- Managed inventory and tracked the product lifecycle across business operations.
- Analyzed sales and consumer engagement data to optimize product mix and improve ROI at large-scale sporting events

### Cart Staff | Keowee Key Golf Course

*Salem, SC: March–May, August–October 2024*

- Cleaned, maintained, and restocked 100+ golf carts daily to ensure readiness.
- Delivered excellent member service by managing tee times and handling golf bags.
- Fostered a welcoming environment through friendly and professional interactions.
- Oversaw driving range operations, including sand refills and equipment maintenance.

## Related Coursework

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Financial Management I and II | Intermediate Financial Accounting I and II | Business Analytics | Accounting Analytics | Cost Accounting | Investment Analysis | Portfolio Theory and Management | Financial Institutions and Markets | Micro and Macroeconomics

## Organizations | Leadership

- Sigma Alpha Epsilon SC Nu Chapter -- Social chair and Assistant Treasurer also on Risk, Scholarship, Rush, Social, and Bylaws Committee as well as an IFC Rush Guide
- Wall Street South Investment Club and Finance Club

## Technical Skills

- Tools: Microsoft Excel, Power Query, Power BI, Tableau Desktop & Prep, Microsoft Access, Visio
- Skills: Financial Modeling, Data Cleaning, Dashboard Creation, Market Analysis

# Dylan Cupo

Little Silver, NJ | 732-639-2363 | dccupo@gmail.com

## Education

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

Bachelor of Science in Financial Management, Concentration in Corporate Finance

Expected December 2025

GPA: 4.00 / 4.00 | Honors: President's List, Beta Gamma Sigma International Honor Society

#### Relevant Coursework:

- Corporate Valuation (DCF, APV, FTE)
- International Financial Analysis (Futures, Options, Swaps)
- Capital Budgeting & Financial Forecasting
- Corporate Financial Modeling (Excel-based scenario and sensitivity modeling)
- Enterprise Risk Management, Business Strategy Simulation
- Data Analytics for Finance (SQL, Power BI, Tableau, Alteryx)

#### Finance-Oriented Activities:

- Wall Street South Investment Club: Conducted equity research and simulated portfolio strategy
- Financial Management Association: Participated in speaker series and case studies

### Christian Brothers Academy: Lincroft, NJ - High School Diploma, Graduated May 2022

- GPA: 4.00 / 4.00 | National Honor Society, De La Salle Scholar
- Varsity Soccer (Captain), Soccer All-American, Community Service (>80 hours)

## Finance & Analytical Skills

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**Technical Tools:** Excel (Financial Modeling, PivotTables), Power BI, SQL, Tableau, Alteryx

**Financial Concepts & Practices:** Corporate Valuation (DCF, APV, FTE), Capital Budgeting & Cash Flow Forecasting, Financial Analysis, Benchmarking, Risk Assessment, Scenario Modeling, Trend Analysis, Variance Analysis

**Soft Skills:** Analytical Thinking, Adaptability, Team Collaboration, Client Engagement, Initiative

## Professional Experience

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### Edgewater Beach and Cabana Club: Sea Bright, NJ

#### Bar Support Specialist • Summer 2024

- Streamlined inventory control and replenishment processes to enhance operational efficiency during peak periods
- Strengthened teamwork and service responsiveness under high-pressure conditions
- Demonstrated initiative and critical thinking to address unexpected workflow issues

### Alex Ramos Training: Howell, NJ

#### Assistant Trainer • Summer 2023, 2024, & 2025

- Managed multiple client sessions, demonstrating time management and attention to individualized strategies
- Organized training events and camps, applying strategic planning and resource coordination
- Delivered performance data insights to help optimize athlete outcomes

## Leaderships and Finance Engagement

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### Phi Sigma Kappa – Finance & Philanthropy Chair

- Directed fundraising efforts and managed event budgets, reflecting fiscal responsibility
- Led professional development initiatives, including industry speaker series and networking events

### Clemson Men's Club Soccer Team – Treasurer/Operations

- Administered team budget and tracked expenditures using Excel, ensuring financial transparency
- Coordinated logistics for travel and tournaments, managing cost-efficiency and timelines

# AIDAN CUSHMAN

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Clemson, SC | Northborough, MA ♦ 774-258-8192 ♦ acushma@clemson.edu

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## EDUCATION

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**Clemson University, Powers College of Business**

*Bachelor of Science in Financial Management*

**Clemson, SC**

December 2025

- **Dean's List Fall 2024**
- Minor: Accounting
- Emphasis Area: Financial Planning
- Relevant Coursework: Portfolio Management & Analysis, Financial Accounting, Corporate Finance

## WORK HISTORY

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**Oxford Global Resources**

**Sales Intern**

**Beverly, MA**

05/2025-08/2025

- Accelerated pipeline expansion by proactively engaging 175+ daily outbound dials and targeted outreach to “work-in-progress” client leads, both new to Oxford and previously engaged, laying groundwork for future revenue opportunities.
- Leveraged Salesforce CRM to build and maintain a personalized dashboard, enabling real-time visibility into outreach metrics, lead status, and follow-up cadence, enhancing team responsiveness and data-driven decision making.
- Adapted messaging across multiple channels (phone, email, LinkedIn) aligned with Oxford’s B2B sales framework, while learning from senior mentors to refine value propositions relevant to life sciences and IT sector prospects.

**Bartholomew & Company**

**Finance Intern**

**Worcester, MA**

05/2024-08/2024

- Led a key project involving coordination with ten insurance companies to request and gather detailed book of business reports for all advisors.
- Developed comprehensive spreadsheet models to assist advisors in upgrading annuity contracts, leading to revenue growth and enhanced client outcomes.
- Executed reconciliation of client records and digitized hundreds of files, improving internal controls and document accessibility.

## Project

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**Student Investment Fund Project, Clemson Investment Fund**

- Designed a 3-tier Excel-based scoring system to screen 316 REITs based on fundamentals (P/E, cash flows) and technicals (Sharpe ratio, volatility).
- Leveraged Python to automate collection of market caps and historical prices, supplementing Bloomberg Terminal-sourced financial data.
- Co-presented the top three REIT investment recommendations to the Chief Investment Officer of the Clemson University Foundation, demonstrating effective teamwork and communication skills in a high-stakes setting

## Certifications, Activities, and Skills

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**Certifications:** FINRA – Securities Industry Essentials (SIE)

**Activities:** Clemson Finance Club, Clemson Market Trend Research Club

**Technical Skills:** Microsoft Excel (Advanced Formulas, PivotTables), Salesforce, SQL, PowerBI, Tableau, Financial Analysis & Modeling, Data Analytics, Financial Statement Analysis



# Allie R. D'Andrea

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708-802-2635 | [ardandr@clemson.edu](mailto:ardandr@clemson.edu) | 9239 Park Place, Orland Hills, IL, 60487

## Education

**Bachelor of Science in Financial Management**

**Clemson University**

Minor: Accounting

Emphasis: Corporate Finance

Graduation: May 2026

Clemson, SC

GPA: 3.31 / 4.0

## Internship Experience

**US Property and Casualty Treaty Underwriter**

05/2025 – 07/2025

*SCOR Reinsurance*

*Chicago, IL*

- Developed a streamlined tracking system for declined reinsurance submissions by integrating data into existing platforms, enhancing market insight, and identifying future investment opportunities in the insurance sector.
- Collaborated cross-functionally to define key data metrics for underwriting analysis, improving operational efficiency and supporting strategic decision-making in risk assessment.
- Gained hands-on experience in reinsurance instruments and underwriting processes, building foundational knowledge in risk transfer mechanisms and financial structuring.

## Project Experience

**Capital Structure Analysis and EBIT Prediction Project**

11/2024 – 12/2024

*Financial Management II, FIN 3120*

*Clemson University, SC*

- Conducted a comprehensive analysis of capital structure for Costco, evaluating debt and equity to inform optimal structure decisions.
- Developed a Python-based model to predict EBIT, leveraging Financial Data from Excel, using libraries like pandas and scikit-learn.

## Stock Valuation Project

01/2025 – 05/2025

*Investment Analysis, FIN 3050*

*Clemson University, SC*

- Conducted a comprehensive valuation of Home Depot using multiple financial models (Dividend Discount Model, P/E Model, Price-to-Cash Flow Model, Price-to-Sales Model) to estimate intrinsic value and inform investment decisions.
- Built dynamic Excel models to project 2028 stock prices and discount them to present value, applying financial forecasting and valuation techniques to assess buy/sell recommendations.
- Prepared a final presentation to share insights and investment recommendations.

## Leadership Experience

**President**

04/2024 - Present

*Women in Business Organization*

*Clemson University, SC*

- Led Women in Business to become the second-largest campus organization with 500+ members.
- Manage the organization's budget of \$20,000, optimizing resource allocation and ensuring fiscal responsibility.
- Lead a team of 14 executives to collaborate and execute projects that carry out the organization's goals.
- Build and maintain relationships with key industry professionals, securing support for organizational goals.

**Senior Vice President**

12/2023-04/24

*Women in Business Organization*

*Clemson University, SC*

- Developed strategic growth plans with executive management, leading a team of 10 Directors.
- Organized networking events and workshops, serving over 200 members with professional development opportunities.

# HADLEY DARRELL

443-823-8333 · hadleydarrell2@gmail.com

LinkedIn: hadley-darrell

## EDUCATION

**Clemson University**, *Clemson, South Carolina*

*August 2022- May 2026*

*Bachelor of Science in Financial Management*

*Minor: Accounting, Emphasis: Corporate Finance*

- President's List 2023, Dean's List 2022, 2024

**Lorenzo de' Medici Institute**, *Florence, Italy*

*Spring 2024*

- Academic Student Scholarship

## PROFESSIONAL EXPERIENCE

**Allianz Trade**, *Baltimore, Maryland*

*Summer 2025, Winter 2026*

Commercial Controlling Analyst Intern

- Created and distributed 7+ confidential financial reports weekly to department heads and team leads across the Americas
- Maintained and operated Access databases to ensure accurate reporting; flagged anomalies and collaborated with underwriters to resolve discrepancies
- Personally asked by the Commercial Chief of Staff and Regional Head of Sales to build custom Excel dashboards for strategic decision-making

**BFG Financial Advisors**, *Baltimore, Maryland*

*Summer 2024, Winter 2025*

Finance Intern

- Shadowed employees across multiple departments, including advising, operations, client relations, and trading
- Gained hands-on experience with applications such as Excel, Salesforce, and Orion all with an overall emphasis on their financial uses
- Advanced my skills in communication, more specifically with important clients and managing the pressure that accompanies this

**NatAlliance Securities**, *New York, New York*

*June 2024*

Trading Intern

- Was responsible for writing focus deals for the head trader of the New York office, which were then circulated to all branches of the company
- Extensively researched prospective mortgages and studied market cycles to advise traders on potential investments
- Gained valuable hands-on experience with Bloomberg and deepened my knowledge of Financial Excel formulas

## CAMPUS INVOLVEMENT

**Kappa Delta Sorority Member**, *SET Leader, Intramural Sports Participant, Spirit Week Committee*

- Supporting national philanthropies through service and fundraising events with Girl Scouts of America and Prevent Child Abuse America

**Women In Business Club Member**

- Attend club meetings and speaker programs to further my knowledge as a woman in business and network with others in the field

**Wall Street South Investment Club Member**

- Actively trade and manage a \$100,000 simulated investment portfolio while gaining experience with financial analysis, Bloomberg terminals, and Stock-Trak trading platforms

**Finance Club Member**

- Connect with recruiters through events while developing technical and professional skills in finance

**Art Club Member**

- Attend weekly club meetings, generate new art each week and critique the work of other members

**Technical Skills:** Excel, Access, Bloomberg, Power BI, Tableau, Salesforce, Orion, Canva, Quickbooks, Compass, SuccessFactors, OneNote, Planner, Teams, Word, PowerPoint, Outlook, Citrix Workspace, ADP

# Luke C. Dawkins

lcdawki@clemson.edu

(864)-314-2591

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**Purpose:** Seeking Position in Corporate Finance/Accounting

## Education

### **Clemson University**

*Bachelor of Science in Financial Management*

*Bachelor of Science in Accounting*

*Emphasis in Corporate Finance*

Cumulative GPA: 3.8/4.0

President's List 2022-2023 | Dean's List 2023-2025

Palmetto Fellows Scholarship | Tucker W. Hipps Scholarship

Spring 2026

Clemson, SC

## Work Experience

### **Downtown Presbyterian Church**

*Intern*

Assisted in the nonprofit business operations of bookkeeping and accounting

Served youth ministry as a leader of students, projects, and games

Summer 2025

Greenville, SC

### **Reformed Youth Ministries**

*Intern*

Engaged in nonprofit business operations

Served with 20 other team members hosting over 6,000 students each summer

Developed deep relational and communication skills

2023-2024

Panama City Beach, FL

### **Young Mens Christian Academy (YMCA)**

*Head Lifeguard/Personal Trainer*

Obtained CPR certification

Led 20-30 lifeguards in daily operations and scheduling

2019-2023

Powdersville, SC

### **United Parcel Service (UPS)**

*Driver Assistant*

Cultivated relationships with multiple drivers

Ensured 300-400 packages delivered daily

Fall 2022

Clemson, SC

## Leadership & Service

### **IPTAY Student Advisory Board (ISAB)**

*SOF/Events Committee Head*

Liaison between Clemson Students and IPTAY

Responsible for over 10,000 active members

2023-Present

### **Clemson University Finance Club**

*Member*

2025-Present

### **Leadership Signature Program at Clemson**

*Team Lead*

2023

### **Reformed University Fellowship (RUF)**

*Student Leader | Small Group Leader | Emcee*

Public speaking as emcee at weekly meetings

Communications leader in charge of social media and outreach for entire organization

2022-Present

### **Clemson Presbyterian Church**

*Usher*

2014-Present

### **Clemson Swing Club**

*Treasurer*

2023-Present

# Matthew DiCara

mdicara@clemson.edu & mdicara18@gmail.com | (781) 877- 1022 | <https://www.linkedin.com/in/matthew-dicara/>

## EDUCATION

### Clemson University

*Bachelor of Science in Financial Management*

*Minor in Accounting; Emphasis in Corporate Finance*

### Lorenzo De' Medici

*Bachelor of Science in Financial Management*

Clemson, SC

May 2026

GPA: 3.31/4.0

Florence, Italy

Spring 2024

## WORK EXPERIENCE

### TFC Financial

*Financial Planning and Operations Analyst*

Boston, MA

June 2025 – Aug 2025

- Supported financial planning and investment teams by optimizing internal data systems for high-net-worth clients.
- Utilized Excel, Tableau, and CRM tools (e.g., Microsoft Dynamics & Salesforce FSC) to analyze data and support evidence-based decision making.
- Assisted with financial reporting and portfolio monitoring using Tamarac.
- Collaborated with team members to identify operational issues and propose data-driven solutions.
- Participated in team meetings and presented findings on assigned financial and operational projects.

### DiCara's Deli

*Assistant Manager*

Reading, MA

May 2020 – Present

- Organizing and ordering products and prepping catering orders to ensure operational stability.
- Manage workflow through Excel spreadsheets during the Deli's busiest times of the year, including holidays.
- Marketing the deli to expand customer base and engage the community through social media (Instagram, Facebook, etc.).
- Training new employees in customer and deli service.

### Clemson University

*Peer Assisted Learning (PAL) Leader Program*

Clemson, SC

Aug 2023 – Dec 2024

- Organized two tutoring sessions per week with eight to twenty-five students per session in which difficult Calculus topics were reviewed to improve students' understanding of calculus in relation to business models.
- Studied metacognition and applied it to my sessions to improve my personal and student problem-solving skills.
- Taught students various study strategies such as the 5-day test prep, aiming to help students succeed in all subjects.

### Surf's Seafood Restaurant

*Barback*

Woburn, MA

May 2023 – Aug 2024

- Maintained two bars within the restaurant by cleaning, organizing, and restocking.
- Trained new employees leading to stronger and more efficient shifts, leading to better reviews from management and customers.
- Assisted the bartenders by taking orders and pouring drinks to ensure customer satisfaction.

## LEADERSHIP EXPERIENCE

### Alpha Tau Omega

*Philanthropy Officer and Rush Team*

Clemson, SC

Sept 2022 – Present

- Organized the largest charity donation fund which raised \$72,000 in 2024.
- Plan and manage events to raise money for various charities throughout the year and engage in community service, specifically for the Upstate Warrior Foundation.
- Took part in Chapter's 2024 recruitment committee which led to an increase in 36 new members which is the biggest class in Alpha Tau Omega history at Clemson.

## ACTIVITIES, SKILLS, AND INTERESTS

**Activities:** Wall Street South Club, Finance Club

**Skills:** Microsoft Office, CRLA Level 2 trained. Tableau, Power BI, Salesforce CRM, Dynamics CRM, Tamarac

**Interests:** Golf, Hockey, Lacrosse, Traveling

# Dylan C. DiGangi

dylancd25@gmail.com | (781) 999-0283 | www.linkedin.com/in/dylandigangi

## EDUCATION

### Clemson University

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

- President's List 4.0 GPA (Fall 2022, Spring 2023, Fall 2023)

**Clemson, SC**

*May 2026*

*GPA: 3.86/4.00*

### Pantheon Institute

*Clemson Business in Europe*

**Rome, Italy**

*May – June 2024*

## WORK EXPERIENCE

### Tandem Investment Advisors

*Equity Research Analyst Intern*

**Charleston, SC**

*June 2025-August 2025*

- Evaluated six public companies' financial and operational performance to pinpoint investments delivering the consistent, repeatable, and less volatile returns central to Tandem's philosophy
- Analyzed 10-Ks, 10-Qs, earnings calls, and financial statements to synthesize quantitative reports and deliver graph-supported conclusions, presenting my findings and insights to the investment team

### Vineyard Vines

*Sales Associate*

**Charleston, SC**

*June 2025-August 2025*

- Learned effective sales techniques through direct customer interaction, product recommendations, and upselling strategies while working collaboratively in a fast-paced environment
- Developed the ability to adapt communication to diverse customer personalities while applying product knowledge to confidently answer questions and drive purchasing decisions

## PROFESSIONAL DEVELOPMENT & LEADERSHIP

### Delta Sigma Pi Professional Business Fraternity

*President, Vice President of Finance, Vice President of Community Service*

**Clemson, SC**

*March 2023-Present*

- Led team-oriented executive operations for a 150+ member fraternity, driving strategic initiatives to strengthen chapter culture, increase senior involvement, and foster a more purpose-driven and engaged membership
- Reduced member dues by over 10% by analyzing financial operations and implementing cost-saving measures
- Constructed a comprehensive balance sheet and income statement by synthesizing semester transactions, demonstrating advanced proficiency in financial statement analysis and their interconnected relationships
- Coordinated 15+ diverse and meaningful service initiatives to support our local community, leveraging strong networking and communication skills by working with leaders of other campus and community organizations

### Delta Tau Delta Fraternity

*Founding Father, Director of Communications*

**Clemson, SC**

*August 2024-Present*

- Established a values-driven fraternity aimed at mentoring young men to cultivate leadership, personal development, and lifelong brotherhood, while actively serving the community through volunteer initiatives
- Drove alumni engagement, reaching 1,000+, to foster mentorship and networking opportunities; managed accreditation submissions, recorded meeting minutes, curated social media content, and maintained databases

### Financial Management Association

*Alumni Relations Director*

**Clemson, SC**

*September 2023-Present*

- Completed Wall Street Prep's Financial & Valuation Modeling seminar conducted by experienced bankers
- Sharpened Excel skills through forecasting company performance in a comprehensive 100-line model during a modeling bootcamp facilitated by Truist Securities investment bankers

### Blue Key Honor Society

*Distinguished Student Leader*

**Clemson, SC**

*January 2025-Present*

- Selected among top 1% of student leaders for exemplary character, leadership, service, and scholarship; helped lead planning and execution of two of Clemson's biggest traditions, The Pursuit and Tigerama, raising \$100K+ annually for the Students Helping Students Fund

## HONORS & SKILLS

- WallStreetPrep Financial Statement Modeling & DCF Modeling, Cash Flow Chronicles Financial Modeling Bootcamp, Bloomberg Finance Fundamentals Certification, Microsoft Office Suite, Power BI, Alteryx, Tableau

# Bridgette Drouillard

Pleasant Ridge, MI • (248) 571-4300 • drouillardbridgette@gmail.com

## EDUCATION

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

*Bachelor of Science in Financial Management*

May 2026

*Minor: Accounting, Emphasis: Commercial Banking & Investments*

- Cumulative GPA: 3.42/4.0
- President's List (4.0 GPA), Fall 2022

## LICENSING & CERTIFICATIONS

- *Securities Industry Essentials* (SIE) Exam, FINRA
- Bloomberg Certification

July 2025

In Progress

## RELEVANT EXPERIENCE

**HantzGroup, Southfield, MI**

May 2025 – Aug. 2025

*Data Analyst Intern*

- Presented a new retirement asset platform to clients regarding 401K plans, ensuring clarity and understanding.
- Trained advisor teams on the effective use of a new AI software program called Photon.
- Served as a liaison to clients, conducted proxy calls, clarified updates, and connected with proxy partners to complete voting.

**HantzGroup, Southfield, MI**

May 2024 – Aug. 2024

*Data Analyst Intern*

- Prepared comprehensive internal reports to monitor weekly progress of advisors, company-wide.
- Reconciled revenue discrepancies across three companies, supporting the launch of a new product line.
- Analyzed client risk profiles and recommended ETF models to advisors during a case presentation.
- Attended senior management meetings to gain insight into client interaction and corporate collaboration strategies.

**HantzGroup, Southfield, MI**

May 2023 – Aug. 2023

*Operations Intern*

- Standardized a financial planning aggregation tool, improving portfolio analysis and visualization for advisors.
- Drafted and reviewed annuity contracts to ensure accuracy for advisors and clients.
- Facilitated client and product company communication via phone and in-person interactions.

## ACTIVITIES & INVOLVEMENT

- Finance Club: Member
- Wall Street South Investment Club: Member
- Alpha Lambda Delta Honor Society: Member
- Hantz Farms: Volunteer
- Women's Club Soccer: Member

August 2023 – Present

August 2024 – Present

December 2022 – Present

June 2022 – Present

August 2022 – May 2024

# Ronan Dunn

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## **Education**

### **Clemson University**

August 2022 – May 2026

- GPA: 3.79/4.0
- Bachelor of Science in Financial Management with a minor in Accounting

### **University of New Haven | CEA Capa Study Abroad Program: Barcelona, Spain**

January 2025 – April 2025

## **Work Experience**

### **OceanFirst Bank | *FP&A, Corporate Development, and Investor Relations Intern***

June 2025 – August 2025 | Red Bank, NJ

- Supported the build out and process for budget vs actual reporting to expedite monthly reviews.
- Built dynamic forecasting templates for specific departments, streamlining annual budget development.
- Analyzed financial statements and metrics to support quarter-end earnings release deliverables.
- Joined the D&I Council and helped organize a Disabilities and Inclusion panel speaker event.

### **MediaRadar, Inc. | *FP&A Intern***

June 2024 – August 2024 | Remote

- Collaborated with the finance team to create monthly board reports.
- Used software such as NetSuite and Salesforce to create and audit financial reports.
- Worked with the accounting department to update company budgets weekly.

### **Side Dish at Chapel Beach Club | *Kitchen/Grill Manager***

May 2018 – August 2024 | Sea Bright, NJ

- Prepared menu items on the grill and fryer.
- Managed a kitchen of 5 employees.
- Monitored line efficiency and implemented improvements to increase productivity.

## **Extracurriculars**

### **Member of Sigma Alpha Epsilon Fraternity**

January 2023 – Present

- Organize and contribute to monthly community service events.
- Joined intramural and social committees to encourage contributions from active members.

### **Beta Alpha Psi**

January 2024 – Present

- Tutor students in Finance and Accounting classes.
- Organize and contribute to professional and community service events.

### **Wall Street South Investing Club**

August 2024 – Present

- Manage a portfolio, monitor performance, and make adjustments to optimize returns.
- Attend and contribute to club networking events and monthly luncheons.



# Daniel Duran-Milpas

(864) 569-3409 • dduranm@clemson.edu • Clemson, SC

## Education

- Bachelor of Science in Financial Management | Emphasis: Corporate Finance December 2025
- Clemson University, Wilbur O. and Ann Powers College of Business

## Professional Experience

### **Credit Intern**

06/2025 – 08/2025

**Michelin North America, Inc.** – Greenville, South Carolina

- Reviewed and analyzed customer financial statements, preparing financial spreads to support credit managers in evaluating creditworthiness and setting appropriate credit limits.
- Conducted research using credit reporting agencies and internal systems to assess customer risk profiles.
- Generated and organized credit reports to ensure timely, accurate, and well-documented decision-making within the credit team.

### **Purchasing Intern**

06/2024 – 08/2024

**Michelin North America, Inc.** – Greenville, South Carolina

- Assisted with vendor audits as necessary, ensuring adherence to established quality standards within our supply chain partners.
- Maintained thorough documentation of contracts, agreements, and related records for easy reference and compliance.
- Acted as general administrative assistant to the services purchasing team.

### **B2B Virtual Sales Intern**

06/2023 – 08/2023

**Michelin North America, Inc.** – Greenville, South Carolina

- Analyzed customer feedback and identified areas for improvement.
- Conducted market research to assess customer needs and preferences.
- Adapted quickly by learning software for tracking progress and reporting results within sales.

### **HR Database Admin**

06/2021 – 08/2021

**Michelin North America, Inc.** – Greenville, South Carolina

- Integrated various data sources into centralized databases, simplifying data analysis efforts across departments.
- Managed sensitive employee information, ensured confidentiality, and upheld access protocols.
- Streamlined data storage and retrieval processes for enhanced efficiency in daily operations.

## Leadership

### **Club Treasurer**

07/2024 – 06/2025

**Rotaract Club of Clemson** – Clemson, South Carolina

- Presented funding proposal and secured significant funds from Clemson Student Funding Board.
- Managed club funds with integrity, processed membership fees, initiated fundraising events, and prepared next year's budget.
- Showcased commitment to the organization's mission through consistent attendance at meetings.

## Skills

- Proficient in Microsoft Office Excel, Word, PowerPoint, Power BI, & Access.
- Programming languages: Python, C, & C++.

# Jake Eklund

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## Education

Bachelor of Science in Financial Management  
Emphasis in Corporate Finance  
Minors: Computer Science and Accounting  
Clemson University

Spring 2026  
GPA: 3.56/4.00  
Clemson, SC

## Relevant Coursework

*Corporate Financial Analysis — Risk Analysis — Intermediate Financial Accounting — Investment Analysis  
Financial Management — Business Strategy*

## Work Experience

### Financial Analyst Internship

May 2025 - August 2025  
Richmond, VA

*Dominion Energy*

- Financial planning and forecasting of \$870M budget
- Developed predictive model to support strategic forecasting
- Analysis and presentation of capital investment decisions
- Developed comprehensive training modules to educate team members

### Team Leader

May 2020 - May 2025  
North Chesterfield, VA

*Chick-Fil-A*

- Led and trained new team members to ensure consistent high execution
- Developed and led shifts
- Interacted with and served guests

## Leadership Experience

### Men's Small Group Coordinator

April 2025 - May 2026  
Clemson, SC

*Fellowship of Christian Athletes*

- Interviewed & selected leaders for 40 small groups for over 700 members
- Recruited and matched mentors to every group leader
- Planned and executed large-scale men's events with over 500 attendees

## Activities and Clubs

### Clemson Fintech Club

Spring 2024 - Present

*Member*

### Wall Street South Investment Club

Fall 2024 - Present

*Member*

### Freshman Outreach Team

Fall 2023 - Present

*Member*

## Certificates and Computer Skills

Anaplan - *Certified Level 1 Model Builder*   Excel - *Intermediate*   Power BI - *Intermediate*  
Bloomberg Terminal - *Beginner*   SAP - *Intermediate*   Python - *Intermediate*   C/C++ - *Intermediate*

**Jacob L. Flight**  
(217) 549-2278 | [Jflight@clemson.edu](mailto:Jflight@clemson.edu)

## Education

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### **Clemson University**

*May 2026*

*Bachelor of Science in Financial Management*

*Emphasis in Corporate Finance, Accounting Minor*

Cumulative GPA: 3.5/4.0

President's list (Fall, 2023), Deans List (Spring 2023), Cubs Undergraduate Business Certificate

### **Maastricht University**

*February 2025 – June 2025*

- Worked on an internal control audit case from Deloitte, and money laundering audit case from PWC
- Worked on a case where the objective was to try and replicate a hedge fund's investing portfolio, and a separate case where I used derivatives to analyze Berkshire Hathaway's acquisition of Heinz

## Relevant Experience & Certifications

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### **Securities Industry Essential (SIE), Passed**

*August 2025*

- Tests knowledge on the securities industry
- Allows me to take more advanced exams to improve my qualifications to work in different financial fields

### **Financial Management Association (FMA), Professional Development Executive**

*August 2023 – Spring 2025*

- Attend weekly meetings and workshops to gain insights into career discernment and provide exposure to different roles in the financial services industry
- Truist Case Study: Analysis of hypothetical company, worked with credit delivery within the Investment Bank division, discussed potential risks and mitigation, used metrics such as debt-coverage ratio, free cash flow, and EBITDA, ultimately discussed whether Truist would lend to the company
- Financial Modeling Bootcamp: worked through a 100-line model, learned how to use assumptions, created debt and interest schedules

### **Orange & Regalia Student Managed Investment fund**

*September 2024 -- Present*

- Engage in weekly meetings where we dive into financial analysis, learning how to effectively value a company through different means such as through ratios, and modeling. We learned how to compute the WACC for a company, and completed a DCF model, as well as a stock primer
- Gave a stock pitch on 3M to finish training and become a member of the organization

## Work Experience

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### **Ocean Lakes Campground, Myrtle Beach, SC**

*May 2024 – August 2024*

- Worked as a supervisor overseeing food service venues throughout the park, gained experience managing cooks and cashiers, while working to improve customer satisfaction, employee satisfaction, and sales

### **Nike Factory Store, Myrtle Beach, SC**

*May 2023 – August 2023*

- Gained experience working in a diverse customer facing role in which I assisted the clientele in finding specific products, answering questions about merchandising, and closing sales, while successfully navigating a fast-paced work environment

## Technical Skills & Interests

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**Skills:** Python | Microsoft Applications (Excel, Word, PowerPoint) | Financial Statement Analysis | French

**Interests:** Financial Modeling | Financial Analysis | Investment Research | Football | Working Out | Cooking | Music

# Max French

1325 2nd St, Wilson, WY 83014 | (307) 699-8589 | [maxfrench55@gmail.com](mailto:maxfrench55@gmail.com) | [www.linkedin.com/in/max-french/](http://www.linkedin.com/in/max-french/)

## EDUCATION

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

*B.S. Finance - Real Estate, B.S. Marketing*

**GPA: 3.61/4.0**

**Clemson, South Carolina**

*May 2026*

## WORK EXPERIENCE

**The Bunker**

*Startup Marketing/Finance Director*

**Jackson Hole, Wyoming**

*May 2025 - August 2025*

- Worked with ownership to create a launch plan for this golf simulator/craft cocktail bar.
- Hosted multiple tournaments and created league play that will be used for future opportunities.
- Met with hotels, tourist attractions, event planners, and Jackson Hole Chamber of Commerce to launch the brand locally.
- Monitored ROI of different initiatives, and modeled out different food and drink plans to maximize profitability.

**Purple Orange Brand Communications**

*Affiliate Marketing Intern*

**Jackson Hole, Wyoming**

*May 2024 - August 2024*

- Created and maintained a CRM database for over 1,000 affiliate contacts, including Forbes, CNN and NY Times.
- Monitored and vetted applications within 20 affiliate programs to select high-value partners for brands such as Solo Stove, Rumpl and Keter.
- Collaborated with internal teams to provide clients with a seamless experience and enhance their reach and brand messaging.
- Led an assessment of over 300 affiliates for Rumpl to enhance affiliate program performance, analyzing CPA, CPC and ROI metrics.

**Reserve at Lake Keowee/Shooting Star Jackson Hole**

*Outside Services*

**Six Mile, South Carolina/Jackson Hole, Wyoming**

*June 2021 - May 2024*

- Managed anywhere from 50-200 tee times per day and created a seamless and enjoyable experience for a membership of about 300.
- Worked with a team of about 30 employees to maintain a professional staff reputation and a constant state of preparedness.
- Was responsible for the cleanliness and organization of about 250 member and rental golf bags and about 60 golf carts.

## ORGANIZATION INVOLVEMENT EXPERIENCE

**Pi Kappa Alpha Fraternity - Treasurer**

*March 2023 - Present*

- Manage a budget of over \$250,000 which includes budgeting, expense tracking, and dues collection, ensuring fiscal responsibility and transparency.
- Scholarship Chair, Judicial board member

**Wall Street South Investment Club**

*August 2024 - Present*

- Participating in portfolio management simulations, trading room sessions, luncheons, and guest speakers.

**Real Estate Club**

*August 2022 - Present*

- Attend presentations and networking opportunities with different Real Estate companies and other Real Estate interested students.

**Clemson Order of Omega**

*October 2024 - Present*

- Clemson's greek honor society; top 5% of the Fraternity and Sorority community.

**Omicron Delta Kappa**

*November 2024 - Present*

- National Leadership Honor Society recognizing students who are top leaders in scholarship, athletics, service, mass media and performing arts at the University and in the community

## SKILLS & HONORS

### Skills

- Proficient in Microsoft Office (Word, Excel, Outlook, PowerPoint)
- Corporate organizational programs (Asana, Copper CRM, Slack)
- Affiliate marketing programs (Affluent, Impact, CJ, Avantlink, SEMrush)
- Budgeting, forecasting, financial reporting, expense management, auditing and compliance.

### Honors

- Clemson University Dean's List

*Spring 2023 - Spring 2025*

# NICK FUHRMANN

(469) 993-5092

Nwfl204@gmail.com

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Honors Finance and Accounting student (4.0 GPA) with experience in financial modeling, equity research, and data-driven reporting. Proven ability to deliver polished analyses and presentations to senior stakeholders through internship and leadership roles. Seeking to apply strong quantitative, communication, and problem-solving skills in financial management and investment analysis.

## EDUCATION

CLEMSON UNIVERSITY HONORS COLLEGE

Clemson, SC

**Bachelor of Science with Honors: Financial Management and Accounting**

May 2026

GPA: 4.0

## EXPERIENCE

MACQUARIE GROUP

Jacksonville, FL

**Asset Management – Private Markets Summer Intern**

June 2025 – August 2025

- Built and managed complex Excel models to prepare financial statements and summaries for subsidiary entities.
- Extracted and analyzed financial data from Oracle and other systems to support reporting needs, trend analysis, and decision-making processes.
- Created and delivered presentations to important stakeholders and office management.

CLEMSON UNIVERSITY ACADEMIC SUCCESS CENTER

Clemson, SC

**Tutor Mentor**

May 2025 – Present

- Supervise and mentor a team of peer tutors, providing ongoing feedback, support, and performance reviews.
- Lead orientation and professional development sessions to train new tutors and promote ongoing growth in teaching strategies, communication, and subject expertise.

CLEMSON UNIVERSITY ACADEMIC SUCCESS CENTER

Clemson, SC

**Tutor – Accounting, Economics, Statistics**

August 2024 – Present

- Motivate students towards learning and studying to build self-confidence and reduce fear of failure.
- Collaborate with students to aid understanding of the material, identify lagging skills, and correct weaknesses.
- Coach students with helpful study habits and exam strategies.

CAMP RIDGECREST FOR BOYS

Black Mountain, NC

**Counselor**

May 2024 – August 2024.

- Exemplified a man of good character to many campers in need of a role model, developing camper independence and self-confidence.

## SKILLS

Excel (VBA, Modeling, Pivot Tables), Bloomberg, Word, PowerPoint, Oracle, TM1

## ACTIVITIES

Lead Guitarist for local band (Paid to perform across the Southeast)  
CFA Institute Global Equity Research Competition - Clemson Representative  
Clemson University Symphonic Orchestra – First Chair Guitar  
Clemson FCA Community Service Team Leader  
Life Point Church Worship Team Member  
Beta Alpha Psi (Finance and Accounting Honor Organization) - Member  
Beta Gamma Sigma – Inducted Member (Top 10% of business students worldwide)

# Tonya Geathers

123 Rufus Loop, Georgetown, SC 29440  
843-240-6522 • tonyar.geathe@gmail.com

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## OBJECTIVE

Motivated and results-driven Finance major with hands-on experience in auditing, financial operations, and client support. Seeking opportunities in investment management, corporate finance, or financial planning where I can apply my analytical, risk evaluation, and strategic problem-solving skills while contributing to organizational goals.

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## EDUCATION

### Bachelor of Science in Financial Management

Dec 2025

Clemson University

- Minor in Accounting and Psychology
- Concentration: Corporate Finance

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## WORK EXPERIENCE

### Business Operations Intern

Kennesaw, GA

Rhythm & Body Pilates

Jun 2025 - Aug 2025

- Gained hands-on experience in small business financial operations and workforce coordination
- Assisted with payroll processing, time tracking, and compensation accuracy to ensure punctual staff payments
- Collaborated with the owner on basic budgeting and cost tracking for marketing and payroll expenses

### Tutor and Coordinator

Clemson, SC

Clemson University America Reads Program

Aug 2022 - Present

- Coordinate tutor deployment, connecting 15+ tutors with elementary students each semester
- Monitor and evaluate student progress, adjusting teaching strategies to individual needs
- Develop and implement strategies to improve student reading comprehension and overall learning outcomes

### Audit Intern

Greenville, SC

South Carolina Department of Revenue

Jun 2024 - Aug 2024

- Analyzed and assessed tax liability, ensuring accuracy and compliance with state regulations
- Conducted internal audits and identified discrepancies within tax returns, bank statements, sales reports, and company receipts
- Prepared detailed audit reports and clearly communicated results to taxpayers, improving transparency

### Grocery Store Clerk

Pawleys Island, SC

Publix

May 2023 - Aug 2023

- Collaborated with team members to achieve operational goals and deliver exceptional customer service assisting with orders and inquiries

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## ADDITIONAL INFORMATION

### Skills:

- **Technical:** Microsoft Excel, Tableau, Python (Pandas), Power BI
- **Professional:** Analytical, Adaptability, Leadership, Communication (Verbal & Written)

### Clubs / Volunteer:

- Black Improvement Association - Secretary
  - Clemson University Paw Pantry - Volunteer
  - Clemson University Certified Student Leader
- October 2024 - Present  
Aug 2023- Present  
November 2024

# Joseph Giambalvo

Stamford, Connecticut • Joeysgiambalvo@gmail.com • <https://www.linkedin.com/in/joeygiambalvo3>

## EDUCATION

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### Clemson University

Bachelors of Science in Financial Management; Minor in Accounting; Emphasis in Real Estate

May 2026

Clemson, SC

Cumulative GPA: 3.65/4.0

### Clemson University Honors College

Fall 2023 - Present

### Clemson University President's List

Fall 2023

### Clemson University Dean's List

Spring 2023, Spring 2024, Fall 2024

**Affiliations:** Phi Sigma Kappa, Sigma Alpha Lambda, Real Estate Club, Investment Banking Club, Financial Management Association, and Finance Club

### CEA CAPA Education Abroad

January – May 2025

Relative Coursework: Investment Analysis and Financial Statement Analysis

Barcelona, Spain

## EXPERIENCE

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### CVS Health - Aetna

Hartford, CT

Corporate Finance Intern

June 2025 – August 2025

- Supported the HCB Financial Accounting team by performing quality assurance reviews on account reconciliations to ensure accuracy, compliance, and adherence to internal controls
- Enhanced the quality assurance process by developing an automated grading system in Smartsheet to assign reconciliations to graders and send timely due date notifications, improving efficiency and accuracy.
- Utilized Power BI to design interactive dashboards visualizing reconciliation quality trends, enabling leadership to monitor performance and identify improvement opportunities.
- Gained hands-on corporate finance experience at a Fortune 5 healthcare company, contributing to process improvements and cross-functional collaboration within the Healthcare Benefits segment

### Vianio Imports

New York, New York

Inventory Analyst Intern

June 2024 – August 2024

- Analyzed historical sales data to identify slow-moving items and presented targeted promotions or liquidation strategies to optimize inventory turnover
- Collaborated with purchasing team to forecast demand and adjust inventory levels accordingly, minimizing overstock situations
- Achieved an approximate 8% reduction in inventory costs by optimizing storage at a public warehouse

### Carefree Boat Club

Stamford, CT

Dockhand

June 2024 - August 2024

- Successfully sold 6 memberships in just over two months through personalized boat tours, showcasing strong sales skills and customer relationship management abilities
- Coordinated closely with supervisors and team members to efficiently schedule and coordinate dockage of vessels, optimizing operational efficiency and customer service
- Ensured boat safety and integrity by conducting thorough pre- and post-inspections to prevent damage and maintain readiness

### DIG.

Stamford, CT

Front of House Lead

May 2023 - August 2023

### Stanwich Country Club

Greenwich, CT

Server

June 2022 – August 2022

## SKILLS/INTERESTS

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**Technical-** Microsoft 365, Smartsheets, Canva, LLM's, Bloomberg Terminal, Financial Modeling, Power BI and Tableau

**Interests-** Snowboarding, Physical Fitness, Golf, Cooking, Fishing, Tennis, Sports and Dirt Bike Riding

# Jake Gomann

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## Education

### **Clemson University**

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

**Clemson, SC**

*May 2026*

## Work Experience

### **Clemson University**

*Tour Guide*

**Clemson, SC**

*October 2024-Present*

- Lead campus tours, delivering engaging and informative presentations to prospective students and families
- Serve as a positive, knowledgeable ambassador for Clemson University
- Respond to visitor questions and provide personalized guidance on admissions, student resources, and campus culture

### **Moondance Adventures**

*Trip Leader*

**Belize**

*Summer 2025*

- Led 36 high school students across three 14-day adventure trips in Belize, fostering leadership, teamwork, and personal growth
- Managed trip budgets and expenses as trip accountant, ensuring financial accuracy for all three sessions
- Coordinated logistics with local outfitters, ensuring timely schedules, safety compliance, and smooth operations
- Built a supportive group culture focused on leadership, teamwork, and personal growth

### **Strombom Properties**

*Real Estate Analyst*

**Loomis, CA**

*Summer 2024*

- Performed market analyses through CoStar to understand property values within the local area
- Conducted tours for prospective tenants, providing in-depth information about the properties
- Visited properties to provide owners with rent estimates and comparative market analysis
- Gained hands-on exposure to brokerage, investments, commercial development, and property management

## Campus Involvement

### **Orange & Regalia Fund**

*Head Analyst*

**Clemson, SC**

*August 2025-Present*

- Lead analyst for the Energy & Utilities sector, coordinating research and evaluating companies through DCF and comparable analysis
- Collaborate with peers to analyze macroeconomic trends and present investment pitches to the fund
- Completed development sessions on valuation and investment strategies, including DCF modeling

### **Phi Gamma Delta**

*Recording Secretary*

**Clemson, SC**

*2024*

- Recorded and organized all internal and external fraternity documents, ensuring accurate and accessible records for over 100 members
- Managed weekly chapter meeting minutes and tracked attendance at events, maintaining comprehensive records to support fraternity operations
- Oversaw and supported various chair positions (philanthropy, community service, fundraising, etc.), assisting in goal-setting and providing direction to enhance fraternity initiatives

## Certifications

- CoStar Commercial Real Estate Analyst (CREA) Certification
- Financial Industry Regulatory Authority (FINRA) SIE - In Progress



# EDWARD P. GRAHAM

[epgraha@clemson.edu](mailto:epgraha@clemson.edu) | (203)-989-7098 | Charleston, SC | [www.linkedin.com/in/edwardpgraham](http://www.linkedin.com/in/edwardpgraham)

## Education:

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

Expected Graduation: May 2026

Bachelor of Science in Financial Management

Bachelor of Science in Accounting

Minor in Economics

- GPA: 3.69/4.0
- CFA Level I Candidate, CFA Institute

**Istituto Lorenzo de' Medici: Florence, Italy**

Summer 2024

Study Abroad Program

- Developed cultural awareness, adaptability, and global business acumen through immersive international experiences.

## Relevant Coursework:

**Gateway to World Markets: New York City, NY**

May 2024

Summer Program

- Participated in a research trip to New York City, exploring financial institutions and accounting practices where I gained firsthand exposure to financial institutions and practical applications of financial theories and accounting principles.

## Work Experience:

**Academic Success Center: Clemson University**

Summer 2024 - Present

*Accounting and Finance Tutor, CRLA Level 3 Certified*

- Conducted over 250 one-on-one tutoring sessions in finance and accounting each semester, both through Clemson's Academic Success Center and my own independent tutoring business, improving student comprehension and performance.
- Simplified complex financial and accounting concepts to boost academic outcomes, tailoring sessions for diverse learning styles across both university and private clients.

**Wellmore of Daniel Island Luxury Assisted Living/Memory Care: Charleston, SC**

Summer 2023 - Present

*Caregiver and Waiter*

- Provided compassionate care and support to residents in both assisted living and private family settings, ensuring their comfort and well-being.
- Facilitated communication between non-English-speaking employees and staff, fostering an inclusive workplace.

## Leadership Experience:

**Volunteers4LIFE President: Clemson University**

Fall 2022 - Present

*President and Executive Board Member*

- Lead an 18-member executive board and oversee strategic direction for Clemson's largest student-led organization, supporting 650+ active volunteers serving students in the ClemsonLIFE program.
- Coordinate campus-wide events and initiatives promoting inclusion for individuals with disabilities, while fostering partnerships with Greek life and other student organizations to expand outreach and philanthropic impact.

**Alpha Tau Omega Fraternity: Clemson University**

Fall 2024 - Present

*Treasurer and Executive Board Member*

- Managed a \$230,000+ annual budget for a 110-member fraternity, driving financial stability through strategic planning, detailed expense tracking, and compliance with organizational policies.
- Founded and chaired a financial committee to improve fiscal oversight, streamline resource allocation, and strengthen long-term financial sustainability.

**Wall Street South Investment Club: Clemson University**

Fall 2024 - Present

*Officer and Executive Board Member*

- Oversaw a \$100,000 portfolio simulation during a semester-long trading competition, guiding members through investment decisions across equities, ETFs, and derivatives.
- Led educational initiatives and developed meeting agendas to boost engagement, strengthen technical learning, and prepare members for careers in finance.

## Organizations | Certifications | Skills:

**Organizations:** Clemson Financial Management Association, Clemson Business Peer Mentor, Boy Scouts of America Life Scout

**Certifications:** Wall Street Prep Financial Statement and DCF Modeling Certification, Bloomberg Market Concepts Certification, CFI Corporate Finance Foundations Professional Certificate, Clemson University Professional Development Certificate

**Skills:** Excel, Power BI, Tableau, PowerPoint, Bloomberg, Alteryx

**ADRIANNE GRANDA**  
(864) 621-5568  
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www.linkedin.com/in/adriannegranda

## EDUCATION

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**Clemson University – College of Business**  
*Bachelor of Science in Financial Management*  
*Minors: Accounting and Management*  
*Emphasis: Real Estate*

Clemson, SC  
May 2026  
GPA: 3.35/4.0

## EXPERIENCE

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**RAINES ON EXCHANGE**  
*Server*

Pendleton, SC  
May 2024 - August 2024

- Served multiple tables simultaneously, providing prompt and efficient service to all guests.
- Excelled in communication and teamwork within a cohesive work environment to ensure exceptional service.

**PIXIE & BILL'S**  
*Server and Host*

Clemson, SC  
July 2025 - Present

- Provide fine dining services by memorizing and accurately delivering food and beverage orders without the use of POS systems.
- Coordinate seating arrangements and reservations to ensure smooth front of house operations and minimal wait times.

## CAMPUS INVOLVEMENT

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**SIGMA KAPPA SORORITY**  
*Member*

August 2023 – Present

- Building relationships with leaders and organizations to enhance efforts and maximize impact.
- Representing the organization with outreach efforts promoting the importance of philanthropy and encouraging others to get involved.
- Actively volunteering for various charitable events.

**FINANCE CLUB**  
**FINTECH CLUB**  
**REAL ESTATE CLUB**

August 2022 - Present  
August 2024 - Present  
August 2024 - Present

## HONORS

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Recipient of Life Scholarship  
Recipient of Orange Carpet Scholarship  
College of Business Dean's List

Fall 2022 - Present  
Fall 2022 - Present  
Fall 2023 – Spring 2024

## CERTIFICATIONS AND SKILLS

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### Certifications:

- Project Destined: Commercial Real Estate Fundamentals Certificate Program
- Bloomberg Certification (In Progress)

**Skills:** Bilingual (Spanish/English), Microsoft Office, Team Collaborator, Adaptability, Communication

# REBECCA HAN

(843) 489-6283 • Email: Rhan2@clemson.edu • www.linkedin.com/in/rebecca-han22/

## EDUCATION

CLEMSON UNIVERSITY	Clemson, SC
<i>Bachelor of Science in Accounting</i>	December 2025
<i>Bachelor of Science in Financial Management</i>	GPA: 3.8/4.0
Emphasis in Corporate Finance	
Clemson University Honors College	

## RELEVANT EXPERIENCE

<b>K1x Inc. Corporate Tax Software Company</b>	Remote
<i>Tax Technology Intern</i>	June 2024 - August 2025
<ul style="list-style-type: none"><li>Reviewed over 1000 K-1 forms and a broad range of federal and state tax forms to assist tax department in implementing tax technology solutions such as tax software, automation, and data analytics platforms</li><li>Conducted research to ensure K1x's products remain compliant with changing tax laws and regulations</li></ul>	
<b>Finance Through the Lens of AI &amp; Machine Learning</b>	Clemson, SC
<i>Research Assistant</i>	August 2023- May 2024
<ul style="list-style-type: none"><li>Coordinated with other students as project manager to analyze quantified data via multidimensional linear regression</li><li>Utilized large language models to evaluate current mortgage data in San Francisco with Python and R</li></ul>	
<b>Payroll Department at Clemson University</b>	Clemson, SC
<i>Intern</i>	January 2023 – May 2024
<ul style="list-style-type: none"><li>Prepared and entered over 100 journal entries for each pay cycle to generate financial statements in accordance with GAAP</li><li>Oversaw day-to-day processing of payroll for all 6,000+ university employees, including review of timesheets and computing deductions for withholdings</li></ul>	

## LEADERSHIP & ACTIVITIES

2023 Bloomberg Global Trading Challenge, 2 <sup>nd</sup> place for Clemson University	
Scholars of Finance, Member	2023 - Present
Dixon Fellowship Program, Junior Fellow	2022 - Present

## HONORS & AWARDS

- National Scholars Program, Recipient of Clemson University's premier full tuition academic scholarship and enrichment program
- 2024 Experiential Learning Grant, Recipient x3
- South Carolina Palmetto Fellows Scholarship, Recipient
- 2x 1st place in South Carolina Association Career Development Conference Competition for Accounting 2021-2022
- President's List Fall 2022 - Fall 2023

## SKILLS & CERTIFICATIONS

Microsoft Excel • PowerBI • Tableau • SQL • Tax Preparation • Financial Analysis • Python • Adobe

## CERTIFICATIONS:

- Clemson Power BI Specialist Badge 2024
- Bloomberg Market Concepts Certification of Completion 2024
- Clemson University Professional Development Certification 2024
- QuickBooks Online Certified User 2022
- ACTFL Seal of Biliteracy for Advanced Speaking, Reading/Writing, Listening in Spanish 2022
- Career and Technical Education Completion Certificates for Business Finance and Accounting 2022

# Brady Hannahoe

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## Education

**Clemson University, Wilbur O. and Ann Powers College of Business**  
*Bachelor of Science in Financial Management*  
*Minor: Accounting*  
*Emphasis: Commercial Banking and Investments and Real Estate*  
*Activities: Investment Banking Club (Vice President), Financial Management Association, Intramural Soccer and Football*  
*Honors: President's List - Fall 2022, Spring 2023, Fall 2023; Dean's List - Spring 2024, Fall 2024, Spring 2025*

**Clemson, SC**  
May 2026  
GPA: 3.87/4.0

## Leadership Experience

**Student Managed Investment Fund, Clemson University**  
*Head Analyst*

**Clemson, SC**  
October 2024 – Current

- Selected to lead the Financials and Real Estate group, overseeing a team of four other analysts
- Researched and analyzed company financials and risks to create and present a stock pitch on Southern Copper
- Conducted a Discounted Cash Flow (DCF) analysis to evaluate a company and determine its intrinsic value

**Beta Theta Pi Fraternity, Clemson University**  
*Vice President of Finance*

**Clemson, SC**  
November 2023 – November 2024

- Manage fraternity funds of over ninety thousand dollars on a day-to-day basis
- Budget and plan for fraternity activities such as philanthropic, brotherhood, and social events
- Communicate with other executive members to lead a fraternity of over one hundred brothers

## Work Experience

**Watermark Advisors**  
*Investment Banking Intern*

**Greenville, SC**  
April 2025 – Present

- Collaborated with EMD to prepare CIMS, valuations, and buyer books for two active M&A client engagements
- Assisted in financial modeling to support valuation and deal structuring for sell-side transactions
- Supported business development through M&A article creation and industry research for advisory efforts

**Nieri Family Student-Athlete Enrichment Center, Clemson University**  
*Tutor*

**Clemson, SC**  
August 2024 – May 2025

- Providing one on one support to Clemson's student athletes in both accounting and finance
- Use students' class materials to create instructive activities to increase comprehension of course material
- Motivating and promoting heavy engagement within the classroom and effective study habits

**ADDIPURE / ADDITEQ**  
*Intern*

**Prague, Czech Republic**  
June 2024 – July 2024

- Assisted the business owner in project acquisition of a US investor to Europe
- Compared company product prices on different marketplaces and identified inconsistencies
- Conducted market research to gain efficient marketing strategies and presented results to business owner

## Skills

- Proficient use of Microsoft Platforms including Microsoft Word, Excel, PowerPoint, and Power BI
- Experience in financial modeling and performing Discounted Cash Flow (DCF) analysis
- Strong adaptability and problem-solving skills in multicultural environments to foster effective decision-making

# RYAN K. HARBISON

ryanharbison@icloud.com – 803-260-0237 – [www.linkedin.com/in/ryankharbison](http://www.linkedin.com/in/ryankharbison)

## EDUCATION

### Clemson University (CU)

*Bachelor of Science in Financial Management*

*Emphasis: Corporate Finance; Accounting minor; Spanish minor*

Major GPA: 4.00/4.00; Overall GPA: 4.00/4.00

Clemson, SC

May 2026

## PROFESSIONAL EXPERIENCE

### Southeastern Freight Lines

*Accounting/Finance Intern*

Lexington, SC

May 2025 – August 2025

- Gained cross-departmental experience in invoicing, asset disposal, and reporting using Workday & MetaViewer.
- Contributed to monthly close meetings and financial reporting.
- Led annual SERVE project: partnered with local nonprofit, coordinated donation drive, presented outcomes to department, and hosted guest speaker.

## CUSTOMER SERVICE EXPERIENCE

### Bakon Southern Eatery

*Server & Expo*

Chapin, SC

May 2023 – December 2024

- Provided hospitality and coordinated with staff to streamline operations in a fast-paced restaurant.

## CAMPUS & COMMUNITY INVOLVEMENT

### Finance Club, President

August 2025 - Present

- Represent the Finance Club through career fairs, recruiter sessions, and campus-wide student organization meetings.
- Coordinate with recruiters to promote Clemson Financial Management students and serve as a program ambassador.
- Oversee event coverage by coordinating with Vice Presidents to ensure officer presence at every club event.

### Alpha Phi - Iota Rho Chapter

*Executive Administrator*

January 2025 - December 2025

- Reviewed and approved member-submitted forms, including excuses for missed events, ensuring compliance with chapter requirements.
- Managed and tracked member participation points via Excel to determine eligibility for functions.
- Delivered announcements and updates during chapter meetings to all members.

### Backroom / Recruitment Logistics Chair

August 2025

- Managed behind-the-scenes logistics for recruitment, including organizing ~2,000 Potential New Member profiles.
- Researched PNM social media and personality videos, and prepared materials for recruiters between each round.
- Ensured smooth recruitment execution by organizing PNMs by bump group, number, and other criteria.

### Member

August 2022 – Present

- Attend weekly chapter meetings, contribute to philanthropic initiatives for women's heart health, and complete 10+ volunteer service hours per semester.

### Day / Decor Chair

August 2023, August 2024

- Designed and executed the "preference" round of sorority recruitment.

### Women in Business, Member

October 2025 - Present

- Engaged in professional development workshops and networking opportunities with industry leaders.

### Beta Gamma Sigma

March 2025 - Present

- Membership limited to the top 10% of undergraduate students in AACSB-accredited business programs.

## HONORS & AWARDS

- President's List (6 semesters)
- Mrs. Theodore L. Monroe Scholarship Endowment
- Godshall Brown Family Annual Scholarship
- South Carolina Palmetto Fellows Scholarship

## SKILLS

**Languages:** Spanish – low to moderate proficiency (spoken and written)

**Technical:** MS Excel, MS Word, MS PowerPoint, Workday, MetaViewer, Python (Beginner)

# Nathan Hayes

757-469-1412 | [njhayes@clermson.edu](mailto:njhayes@clermson.edu)

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## EDUCATION

### **Clemson University – Wilbur O. and Anne Powers College of Business**

*Bachelor of Science in Financial Management*

- Minor: Accounting | Emphasis: Corporate Finance
- Honors College | Cumulative GPA: 3.66/4.0

Expected May 2026  
Clemson, SC

### **Lorenzo de' Medici Institute**

*Study Abroad Program*

Spring 2024  
Florence, Italy

## EMPLOYMENT HISTORY

### **Investment Accounting Intern**

*Harbor Group International*

Summer 2025  
Norfolk, VA

- Collaborated on a mock acquisition deal pitch, analyzing market data, building financial models, and projecting returns for a multifamily investment opportunity.
- Assisted with partnership accounting by analyzing distribution costs and tax withholding positions for investors.
- Supported fund accounting by auditing and recording journal entries in MRI for multiple investment funds.
- Organized property tracking and tax data into structured spreadsheets to improve accuracy and accessibility.
- Analyzed tax income distributions for General Partners based on executive sales data to ensure accurate reporting.
- Experienced using platforms such as Yardi, MRI, and Microsoft Office.

### **Commercial Banking Intern**

*Southern Bank*

Summer 2024  
Norfolk, VA

- Completed training in teller operations, deposit compliance, and leadership development.
- Shadowed commercial lenders, treasury professionals, and credit analysts; observed client meetings and internal presentations.
- Wrote weekly reflections to document learning and apply feedback for continuous improvement.
- Researched an industry-relevant issue and delivered a capstone presentation to bank leadership.
- Engaged in professional development programs hosted by the Virginia Bankers Association, Hampton Roads Association for Commercial Real Estate, and Live Norfolk.

## ADDITIONAL EXPERIENCE

*Demonstrated responsibility, leadership, and teamwork in roles outside of my field of study.*

### **After School Counselor – P3 Coaching Lab, Clemson, SC | Fall 2023**

Planned and led basketball programming for elementary students, teaching fundamentals, sportsmanship, and work ethic.

### **Summer Camp Assistant Director – Cape Henry Collegiate, Virginia Beach, VA | Summer 2023**

Assisted in managing daily camp operations, created and led programming, and ensured camper safety.

## ACTIVITIES, INTERESTS, AND VOLUNTEER WORK

**Activities & Interests:** Finance Club · Wall Street South Investment Club · Community of Undergraduate Business Students · Alpha Tau Omega Fraternity · Avid Golfer

**Volunteer Work:** Operation Smile · Upstate Warrior Foundation

# ZACHARY HENTSCHEL

5 White Tail Crt, Stockholm, NJ 07460 | (862) 666-0388 | hentschelzach17@gmail.com

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## Education

**Clemson University**

*Bachelor of Science in Financial Management*

*Minor in Accounting, Emphasis in Financial Planning*

Clemson, SC

May 2026

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## Work Experience

**State Farm Insurance Co.**

*Team Member/Intern*

Greenville, SC

Jan 2024-Apr 2024

- Became familiar with State Farm's Insurance software
- Maintained and created relationships with clients
- Upsold products to policyholders and potential new clients
- Followed up with potential new clients regarding online information requests
- Called on policy holders or potential new clients from a prospective list to meet monthly quotas
- Drove client retention by increasing savings opportunities and identifying premium discounts

**Hardyston Twp DPW**

*Road Maintenance Worker*

Hardyston, NJ

Jun 2020-Sept 2023

- Interpersonal communication skills
  - Safe machinery operation drainage cleaning
  - Snow and Ice Removal
  - Friendly, positive attitude good work ethic reliable & trustworthy maintenance & repair
  - Assisted with roadway projects and highway repairs by controlling traffic patterns
  - Operated heavy machinery with extreme caution, following specific employer guidelines for safety
  - Operated pneumatic tampers to repair joints and patch broken pavement with asphalt
  - Troubleshoot mechanical issues and completed basic repairs to keep equipment working at peak levels
- 

## Extracurriculars/ Philanthropy

- **Phi Sigma Kappa Fraternity** - Co. Home Improvement Chair, Spring 2024
  - **Finance Club** - Member, Fall 2024
  - **Investment Banking Club** - Member, Fall 2024
  - **South Carolina Special Olympics** - Spring 2024
  - **Clemson Wrestling Club** - Member, Fall 2023
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## Skills

- **Proficient in Microsoft Software:** Excel, Word, Powerpoint
- **Interpersonal & Leadership Skills**
- **Strong Organization & Communication Skills**
- **Critical Thinking/ Problem Solving**
- **Project & Time Management**

# Jackson Hollis

Richburg, SC | LinkedIn: <https://www.linkedin.com/in/aubreyhollis/>

803.899.0243 | [hollis7@g.clemson.edu](mailto:hollis7@g.clemson.edu)

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## EDUCATION

### CLEMSON UNIVERSITY

Clemson, SC

*Bachelor of Science in Financial Management and Accounting*

Expected Graduation: May 2026

**Concentrations: Real Estate**

GPA: 3.75/4.00

**Presidents List 2022-2025**

**Relevant Coursework:** Advanced Corporate Financial Management, Intermediate Corporate Financial Management, Financial Data Analytics, Real Estate Finance, Real Estate Valuation, Intermediate Accounting III, Intermediate Accounting II, Intermediate Accounting I, Business Law, Real Estate Law

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## EXPERIENCE

### EBARA PUMPS AMERICAS CORPORATION

*Accounting Intern*

**Jun 2025 – Aug 2025**

Rock Hill, SC

- Analyzed 500+ customers' credit ratings using Credit Safe software, and adjusted in the ERP system based on current ratings, order intake, & payment history
- Created process maps for all functions performed by the accounts payable and receivable accountants. This included step-by-step instructions and video examples
- Assisted the CFO, Controller, and Sr. Accountant in month-end, quarter-end, and year-end tasks such as inventory count, audit, journal entries, etc.

### LEROY SPRINGS & COMPANY, INC.

*Cart/Range Associate*

**Aug 2024 – Present**

Chester, SC

- Maintain and organize golf carts to ensure smooth course operations.
  - Prepare and stock range areas, ensuring golfers have necessary equipment.
  - Support general golf course operations, contributing to an efficient and enjoyable experience for 200 + golfers daily.
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## PROJECTS AND ACTIVITIES

**Capital Structure Recommendation Project** – Utilized deep neural networks using Python to predict future capital structure values, leveraging machine learning techniques to enhance financial forecasting to give a final capital structure recommendation.

**PPA Assignment in Real Estate Valuation** – Conducted a comprehensive valuation analysis of a property using Purchase Price Allocation (PPA) methods to find a value.

**Portfolio Investment Project** – Managed an investment portfolio over three months, actively competing against the S&P 500 to assess performance and strategy effectiveness.

**Activities:** Financial Real Estate Club, Finance Club, National Society of Collegiate Scholars, Community for Undergraduate Business Students (CUBS), 2024 CFA Research Challenge

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## SKILLS & INTERESTS

**Skills:** Microsoft Office (Excel & PowerPoint) | Tableau | Python | SQL | Adobe Creative Suite | Bloomberg | AI / Machine Learning

**Interests:** Financial Literacy | Golf | Hunting | Traveling



# HARRY HOOD

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15 Logan Street, Charleston, SC 29401

## Education

Clemson University

*Bachelor of Science in Financial Management*

*Minor: Accounting, Emphasis in Corporate Finance*

GPA 3.49/4.00

August 2022 – May 2026 (Expected)

## Work Experience

### **Credit Intern**

Southern First Bank | Greenville, SC

May 2025 – August 2025

- Prepared financial statement spread in Moody's CRE, incorporating financial statements for credit underwriting.
- Built Excel model to analyze borrower performance trends to evaluate portfolio risk and loan metrics.
- Collaborated with Relationship Managers and Credit Analysts to streamline workflow, increasing efficiency of data entry and risk rating documentation.
- Designed and presented a Credit Risk Rating Scorecard to the C-Suite Directors, aligning quantitative risk factors with regulatory guidance to centralize risk ratings across all loans.

### **Hospitality Team Member**

82 Queen | Charleston, SC

May 2023 – August 2024

- Cleaned and maintained dining areas with expectations to uphold a high standard of friendliness
- Collaborated with a large team to provide a premium experience to 400+ guests a day
- Timely managed tables to allowed for expedited turnover to maximize profits.

### **Law Office Intern**

Hood Law Firm | Charleston, SC

June 2019 – June 2022

- Assisted with the organization and distribution of files to lawyers, paralegals, and secretaries
- Assigned to the acquirement of signatures from potential clients
- Provided maintenance and upkeep to the office building

## Leadership Experience

### **President**

Kappa Alpha Order Delta Omicron Chapter

October 2024 – Present

- Led chapter of 120 members through community engagement and personal connections
- Assisted with chapter Treasurer to build financial models to help manage over 250 thousand dollars efficiently
- Coordinated with University Administration and national council to uphold fraternity reputation.
- Recognized for the "Chapter Leadership and Excellence Award" given to 5 out of 119 chapter presidents.

### **III Recording Secretary**

Kappa Alpha Order Delta Omicron Chapter

October 2023 – October 2024

- Accounted for member GPA and attendance for meetings
- Strategized and motivated with members to achieve greater academic performance
- Raised overall chapter GPA by 15% while in office
- Mentored and fostered study habits of peers by leading the chapter scholarship committee

## Activities, Skills, and Interests

**Activities:** Wall Street South Investment Club, Finance Club

**Skills:** Microsoft Excel, Power BI, PowerPoint, moderate python performance

**Interests:** Sports, Hunting, and Traveling

## Kallie Horan

(203) 814-0943 · kallieahoran@gmail.com

### EDUCATION

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<b>Clemson University – Wilbur O. and Ann Powers College of Business</b>	<b>Clemson, SC</b>
<i>Bachelor of Science in Financial Management and Accounting (Double Major)</i>	<i>Spring 2026</i>
	Cum GPA: 3.96/4.0

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### WORK EXPERIENCE

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<b>The Riverside Company</b>	<b>New York, NY</b>
<i>Investment Analyst – Riverside Micro-Cap Fund (“RMCF”)</i>	<i>June – August 2025</i>
<ul style="list-style-type: none"><li>Supported the investment team of Riverside’s flagship mid-market control buyout strategy for new opportunities and existing portfolio companies across the software, business services, and franchising sectors.</li><li>Researched industry sectors for new opportunities, identified and benchmarked competitors.</li><li>Reviewed and analyzed financial statements and determined key operating drivers to support diligence.</li><li>Prepared 6 new opportunity memos, highlighting market dynamics, company positioning, financial performance and growth strategies.</li><li>Participated in and developed agendas and questions for management, banker, and industry expert meetings.</li><li>Presented a capstone investment case to senior partners, including an LBO model, sector analysis, and investment recommendation for a K–12 education software company.</li></ul>	
<b>New York Life Investors</b>	<b>New York, NY</b>
<i>Real Estate Investors Accounting Intern</i>	<i>June - August 2024</i>
<ul style="list-style-type: none"><li>Selected for 10-week sophomore corporate internship program for the accounting and finance team supporting the direct real estate investment arm of NYL Investors, NYL Real Estate Investors.</li><li>Prepared financial statements for real estate investment funds, ensuring GAAP compliance and accuracy.</li><li>Conducted account reconciliations and journal entries, supporting efficient monthly close processes.</li><li>Analyzed property financials, generating reports to guide investment decisions and fund strategy.</li><li>Trained incoming full-time finance and accounting analyst during last 3 weeks of internship.</li></ul>	
<b>Harbor Light Foundation</b>	<b>Fairfield, CT</b>
<i>Camp Counselor</i>	<i>Summer 2020 - 2023</i>
<i>Counselor-in-Training</i>	<i>Summer 2018 - 2019</i>
<ul style="list-style-type: none"><li>Supervised groups of up to 15 participants and up to two counselors during multiple summer sessions</li><li>Emergenced as primary counselor for select age-groups while developing planning, collaboration, management and problem-solving skills</li></ul>	

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### ACADEMIC & CAMPUS INVOLVEMENT

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<b>Clemson Women in Business</b>	<b>Fall 2023-Present</b>
<ul style="list-style-type: none"><li>Attend networking events, workshops, and speaker events focused on professional development, networking, community engagement</li></ul>	
<b>Clemson University Investment Banking Club</b>	<b>Fall 2022-Present</b>
<ul style="list-style-type: none"><li>Participate in meetings to discuss financial modeling, valuation concepts and networking skills</li><li>Collaborate with club of ~20 members that partake in investment banking technical training courses</li></ul>	
<b>Clemson University Finance Club</b>	<b>Fall 2025-Present</b>
<b>Vice President</b>	
<ul style="list-style-type: none"><li>Represent the Finance Club at career fairs, information sessions, and university student organizational meetings</li><li>Promote Clemson Finance undergraduates by coordinating with recruiters and serving as an ambassador for the Financial Management undergraduate program.</li></ul>	

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### HONORS AND AWARDS

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<b>Clemson University President’s List (awarded to students with 4.0 GPA)</b>	<b>Fall 2022, 2023, 2024</b>
	<b>Spring 2022, 2023, 2024</b>
<b>Clemson University Dean’s List (awarded to students with <math>\geq 3.5</math> GPA)</b>	<b>Spring 2025</b>
<b>Clemson University Merit Scholarship</b>	<b>2022 to 2026</b>

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### SELECT TECHNICAL SKILLS

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Microsoft Excel, Microsoft PowerPoint, G Suite, Crunchbase, Seeking Alpha, Pitchbook, S&P CapIQ

# RILEY HORN

riley.horn@icloud.com | (407) 670-8493 | www.linkedin.com/in/riley-horn

## EDUCATION

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**Clemson University**  
Bachelor of Science in Financial Management  
Minors in Animal and Veterinary Science and in Accounting  
GPA: 3.50/4.0

Clemson, SC  
May 2026

## WORK EXPERIENCE

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### KPMG

*High Volume Trust Tax Intern*

Tempe, AZ  
June 2025 – Present

- Prepares and reviews fiduciary tax returns, including Forms 1041, 5227, 990, 990-PF, 1040 and 1099.
- Collaborates with senior tax professionals to ensure compliance with federal and state tax laws and regulations.
- Assist with tax compliance by addressing IRS/state notices and researching complex tax issues.

### Pet Paradise

*Resort Associate*

Lake Buena Vista, FL  
May 2024 – Aug 2024

- Supervised and interacted with pets, ensuring their safety and well-being in various environments.
- Maintained cleanliness by disinfecting suites, dog runs, and common areas, and adhering to feeding schedules.
- Monitored pet health, recorded observations, and reported unusual behaviors or injuries to management.

## LEADERSHIP AND COMMUNITY INVOLVEMENT

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### Delta Zeta Sorority

*Homecoming Administrative Assistant*

Clemson, SC  
Jan 2023 – Present

- Generated and managed Microsoft Excel spreadsheets to track event attendance for over 300 members.
- Provided administrative support to directors, demonstrating strong multitasking and organizational skills.
- Coordinated communication between members, facilitating smooth information flow and efficient planning.

### Clemson University Flying Club

*Publicity Committee*

Clemson, SC  
Aug 2022 – Present

- Manage social media accounts on various platforms such as Instagram, Facebook, and Twitter.
- Produced visually appealing and informative content to promote activities, events, and achievements.
- Work collaboratively with the marketing team to engage with the local community to raise engagement.

### A Forever Home Animal Rescue

*Head Volunteer*

Tavares, FL  
Aug 2016 – Aug 2022

- Organize adoption and awareness events at a local pet store averaging \$80 in donations for each event.
- Guide prospective families in their pet search and facilitate the adoption of dogs to safe homes.
- Rehabilitate dogs that were formerly abused through walking, feeding, and socializing them for adoption.

### Women in Aviation Central Florida Chapter

*Social Media Manager*

Orlando, FL  
Jan 2020 – June 2022

- Manage social media accounts for local chapter of female aviation enthusiasts to keep all informed on events.
- Executed 2 Girls in Aviation Days that encouraged young women to enter the male-dominated field of aviation.
- Advised chapter leadership on ways to foster a sense of unity among women in fields related to aviation.

## ADDITIONAL SKILLS, EXPERIENCES, AND INTERESTS

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**Hobbies/Interests:** Student at Orlando Flight School, YoungLife Christian Organization

**Achievements:** President's List (Fall 2023), Dean's List (Spring 2024, Fall 2024), IB Certificate Recipient (2022), Outstanding Scholar Award (2018-2022), Outstanding Community Service Award (2020)

**Technical Skills:** Microsoft Office Suite, ONESOURCE Trust Tax, Administrative Support, Organization

# Walker Hronchek

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hronchekw22@gmail.com

Current Address: 107 Fern Circle, Clemson SC 29631  
LinkedIn: <https://www.linkedin.com/in/walker-hronchek/>

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## EDUCATION

### Bachelor of Science in Financial Management

Emphasis: Corporate Finance

Clemson University

Minors: Accounting, Psychology, Spanish Studies

May 2026  
Clemson, SC  
GPA: 3.5/4.00

### Clemson Language Immersion Program

Universidad de Salamanca

Summer 2024  
Salamanca, ESP

- 9 credit hours to gain experience using in Spanish in its native country

## RELEVANT EXPERIENCE

### CRE Financial Analyst Intern

RealtyLink

Summer 2025  
Greenville, SC

- Supported underwriting and financial modeling for CRE acquisitions, primarily industrial and retail
- Conducted market research and comparative parcel analysis to evaluate investments across southeast
- Prepared and presented internal pitch materials, including cash flow models and return projections

### Executive Board, Treasurer

Kappa Alpha Order Fraternity

Spring 2023- Present  
Clemson, SC

- Prepared and managed \$200,000+ budget
- Designed internal bond-style financing to smooth revenue from dues payments, improving cash flows
- Served as recruiter and during recruitment met with students on-campus, over lunch and on zoom

### Personal Excel Projects

Fall 2024-Present

- Built spreadsheet to predict the outcome of football games using quantitative factors alone
- Built efficiency formula derivative of KenPom metrics to improve accuracy of basketball team evaluations
- Created Risk-Adjusted Pricing model for title insurance start-up

## OTHER WORK EXPERIENCE

### Valet/Doorman

Grand Bohemian Lodge

Fall 2022-Winter 2023  
Greenville, SC

- 40-hour work weeks serving as a valet, greeter, and doorman at 5-Star hotel
- Adapted to and improved communication skills with a variety of customer personalities

### Operations Hand

Lean Kitchen Co

Summer 2023  
Greenville, SC

- Adapted daily to diverse operational tasks, including food prep, inventory and customer service, sustaining 50-hour work weeks in a fast-paced team environment

## ACTIVITIES AND HONORS

Real Estate Club

Fall 2024-Present

Spanish Club

Fall 2024-Present

Clemson Hope Mentorship Program

Spring 2024

Unity Health on Main, a Latino-focused community health center (Volunteer)

Summer 2021

Accredited Interscholastic Coach

Spring 2024

HS Team Captain Football, Baseball

Fall 2021-Spring 2022

## TECHNICAL AND LANGUAGE SKILLS

Financial Modeling

Microsoft Office

Market Research

Spanish (Fluent)

# Jeb Hunter

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## EDUCATION

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

Clemson, SC

*Bachelor of Science in Financial Management*

*Expected May 2026*

*Minor: Accounting, Emphasis: Corporate Finance*

Honors: Dean's List (Spring 2023, Fall 2023, Fall 2024, Spring 2025)

GPA 3.67/4.0

## REVELANT COURSEWORK & CERTIFICATIONS

- Dell GenAI Foundations (artificial intelligence, machine learning, and deep learning)
- Advanced use of Microsoft suite including Excel, Word, PowerPoint, and Power BI
- Financial Accounting, Financial Management, Cost Accounting, Investment Analysis, International Finance, Analytics for Accounting Decision Making, Corporate Valuation, Principles of Real Estate, Individual Taxation

## WORK EXPERIENCE

### Dell Technologies

Round Rock, TX

*Global Facilities Strategy Intern*

*June 2025 – Aug 2025*

- Aligned Capital Expenditures (CapEx) of \$238.5 million with long-term project plans, enhancing financial forecasting accuracy and ensuring optimal allocation of capital across facilities investments
- Analyzed historical energy usage data and forecasted FY27 electricity demand, improving accuracy of real estate energy budgeting
- Developed and implemented a centralized project documentation channel, enabling project managers to upload invoices and project data, streamlining access to financial information and improving reporting accuracy

### Little Scholars, LLC

Richmond, VA

*Teaching Assistant and Warehouse Associate*

*June 2021 - August 2024*

- Oversaw 25 students experiential learning activities, provided educational instruction using custom-designed curriculums, mentored newer staff
- Facilitated shipping logistics of classroom materials of approximately 200 kits a week, collaborating with a team of 15 to organize inventory and efficiently distribute learning materials to teachers

## ACTIVITIES & INVOLVEMENT

### Beta Alpha Psi, Zeta Rho Chapter

Clemson, SC

*Active Member*

*September 2024 - Present*

- Completed professional development activities, including workshops and networking events with finance, accounting, and business professionals
- Engaged in campus community service, including tutoring underclassmen and supporting student organizations through volunteer events

### Beta Theta Pi, Delta Nu Chapter

Clemson, SC

*Intramural Chair, Executive Board*

*September 2022 - Present*

- Enhanced communication skills and contributed to fundraising efforts for the Be Positive Foundation
- Managed social media to update prospective members on events, spotlight members, and uphold positive reputation
- Executive board member, contributing to chapter initiatives, strategic decision making and operations

### South Wall Street Investment Club

Clemson, SC

*Active Member*

*September 2024 - Present*

- Simulated trading and portfolio management with a \$100,000 virtual fund on Stock-Trak
- Gained hands-on experience in stock picking, trading securities, and managing an investment portfolio

## INTERESTS AND SKILLS

- Financial Management Association, P3 Coaching Lab, intramural sports, mentorship, volunteering
- Committed, competitive, organized, determined, communication

# Ezra Ingram

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## Education

### Bachelor of Science in Financial Management

*Clemson University*

Clemson, SC

Emphasis in Corporate Financial Management

May 2026

Double major in accounting

## Work Experience

### Cashier

May 2020-August 2023

*Food Lion*

Woodruff, SC

- Communicated with Customers to better understand how I could assist them
- Effectively operated an order placement system
- Processed both credit and debit payments while also managing a cash drawer

### Front-of-House Team Member

January 2023-August 2024

*Chick-Fil-A*

Clemson, SC

- Helped create a friendly and open environment by providing excellent customer service
- Collaborated with other Team Members in order to effectively and efficiently serve customers during peak business hours
- Maintained a well organized workspace, adhering to company standards of health and safety.

### Sales Associate

May 2025-Today

*Home Depot*

Seneca, SC

- Assisted customers in selecting the right products to successfully complete home improvement projects, ensuring a positive shopping experience
- Member of the inventory management team that oversaw the verification and correction of over 10,000 different SKUs.
- Collaborated with team members to complete management-directed tasks and enhance overall store operations and customer satisfaction.

## Technical Skills

- Excel Proficient
- Python
- Knowledge in performing financial analysis
- Knowledgeable in other software such as PowerBI

## Extra-Curricular Activities

- Member of the Clemson Boxing Club
- Member of the Financial Management Club
  - Participated in Case Study with Truist
- Member of the Fellowship of Christian Athletes

## KYLE INNELLI

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kyleinnelli@gmail.com

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### OBJECTIVE

Focused and reliable student, with consistent results throughout a rigorous course load. Involved in the community and university, looking for a position to showcase my dedication, problem-solving skills, and dependability while learning more about the financial sector.

### EDUCATION

CLEMSON UNIVERSITY	Clemson, SC
<b>Bachelor of Science in Financial Management</b>	May, 2026
Minor: Accounting, Emphasis: Corporate Finance	GPA: 3.96/4.0

### EXPERIENCE

STIFEL FINANCIAL CORP. – PWSG	Garden City, New York
<b>PCG Branch Intern</b>	June 2025 – August 2025
<ul style="list-style-type: none"><li>▪ Gained insight into the unique solutions provided for UHNW individuals, including financial and investment planning processes.</li><li>▪ Collaborated with an experienced wealth management team to conduct research on equities, IPOs, and private investments, supporting UHNW client strategies.</li><li>▪ Participated in firm-wide speaker sessions covering public finance, CIO outlook, structured products, alternatives, and investment banking, enhancing cross-disciplinary knowledge.</li><li>▪ Completed online courses in credit analysis and financial markets.</li><li>▪ Delivered a capstone presentation on Artificial Intelligence in wealth management and finance.</li></ul>	

CLEMSON UNIVERSITY	Clemson, South Carolina
<b>Peer-Assisted-Learning (PAL) Leader</b>	January 2024 – May 2024
<ul style="list-style-type: none"><li>▪ Attended multiple business calculus classes per week and created session plans based on observations.</li><li>▪ Hosted biweekly sessions where students can learn study skills, apply concepts, and escape their comfort zone.</li></ul>	

HALLIDAY FINANCIAL	Glen Head, New York
<b>Wealth Management Intern</b>	May 2023 – August 2024
<ul style="list-style-type: none"><li>▪ Shadowing client meetings to gain insights into financial planning strategies and client interactions.</li><li>▪ Assisting in tracking client progress toward financial goals and providing support for client-based objectives.</li></ul>	

SAGAMORE YACHT CLUB	Oyster Bay, New York
<b>Launch Operator</b>	May 2023 – August 2024
<ul style="list-style-type: none"><li>▪ Driving members from the dock to their moored boats, and overall waterfront maintenance.</li></ul>	

### SKILLS

SIE – (In Progress)  
Bloomberg Certifications – Market Concepts (BMC) & Finance Fundamentals (BFF)  
CreditSights: New to Credit Program  
Excel – Principles of Excel, along with capital structure and budgeting work in multiple classes.

### ACTIVITIES

Alpha Kappa Psi – VP of Administration	January 2025 – Present
Student Managed Investment Fund – Consumer Goods Analyst	September 2024 – Present
Financial Management Association	August 2023 – Present

### INTERESTS

Soccer, Weightlifting, Cooking, Volunteering

# Riley Jensen

Pendleton, SC  
Rileysjensen22@gmail.com  
781-635-5185

## EDUCATION

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### **Clemson University, Powers College of Business - May 2026**

Bachelor of Science in Financial Management  
Minor: Accounting, Emphasis Corporate Finance  
GPA: 3.60

## EXPERIENCE

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### **Scotland Yard Landscaping Inc - Canton, Massachusetts – Summer 2025**

Landscape Crew Member

- Assisted in major outdoor projects, including deck renovations, stone wall construction, and pool coping installation.
- Operated heavy machinery, including skid steers and excavators, to complete site preparation and installations.
- Worked consistently in demanding conditions, showing reliability, endurance, and attention to detail.

## LEADERSHIP EXPERIENCE

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### **Powers College of Business Leadership Signature Program**

*Comprehensive five-semester program focused on professional leadership development.*

### **Executive Leader – Deputy Chief Marketing Officer | Jan 2025 – May 2025**

Oversaw marketing initiatives, coordinated with cross-functional teams, and guided peers on branding and outreach strategies.

### **Team Leader – Facilities/Communications Department | Jan 2024 – Dec 2024**

Directed team operations, facilitated internal communication, and ensured department projects were executed efficiently.

### **First-Year Leader – Resources/Guidance Department | Jan 2023 – Dec 2023**

Mentored first-semester students, providing academic and professional guidance to support their transition into college life.

## Awards & Interests

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**Awards:** Dean's List (3 Semesters), President's List (1 Semester)

**Interests:** Politics, Financial Markets, Pickleball



# NATALIE JULIAN

## Bachelor of Science in Financial Management

### CONTACT



609-314-6419



njulian@clemson.edu



Seneca, SC 29678  
Charlotte, NC 28202

### EDUCATION

#### Clemson University (May 2026)

**Emphasis Area:** Real Estate

**Study Abroad:** Accounting II  
Venice/Milan Italy (2025)

#### Lafayette College (2021-2023)

### SKILLS

Microsoft Excel

Python Certified

Tableau

Financial Analysis

Leadership Experience

Community Engagement

### LANGUAGES

**English** Fluent Writing and Speaking

**French** Intermediate Writing and Speaking

### PROFILE

Seeking professional experience where I can expand on my skills in finance and accounting. Highly motivated Financial Management and Accounting senior with a proven track record in community engagement and customer service. Excelled in enhancing service delivery and demonstrated exceptional communication and organizational skills, through experience as a Human Resources Intern and server.

### WORK EXPERIENCE

#### H.R. Intern- Advanced Lubrication Specialties 05/2025 - 08/2025

- Prepared and presented 30-minute training sessions with Microsoft Powerpoint for new hires concerning company benefits, expectations and safety.
- Interacted daily with plant line workers to field questions and assess employee satisfaction levels.
- Worked with senior staff to help re-organize company processes and help better define each employee's deliverable.

#### Bayhost/ Server- Topgolf 06/2022 - 08/2023

- Handled cash, credit and gift certificate transactions
- Entered guest food and beverage orders into computer system and answered guest questions on menu
- Adapted to/ learned Topgolf technology

#### Server- Ruby Tuesday 05/2024 - 08/2024

- Took customer food and drink orders
- Communicated effectively with kitchen staff and customers
- Cleaned surfaces and organized supplies

### CAMPUS INVOLVEMENT

- Real Estate Finance Club
- Finance Club
- Women in Business
- Club Tennis

### VOLUNTEER EXPERIENCE

- Organized and lead three fund-raisers to support the Project of Easton
- Maintained gardens to provide fresh produce for community members in need.

## Sullivan “Sully” Kadnar

5720 Massachusetts Ave., Bethesda, MD 20816 | (301)-633-7633 | sullivan.kadnar@gmail.com

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### EDUCATION

**Clemson University, Clemson, SC** Graduation  
May 2026  
*Bachelor of Science in Financial Management*  
Emphasis: Corporate Finance | Minor: Accounting  
GPA: 3.3

**Walt Whitman High School, Bethesda, MD —** Graduated  
June 2022  
GPA: 3.9 | Varsity Athlete (Football, Lacrosse, Wrestling)  
• Captain of Football and Lacrosse teams senior year

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### EXPERIENCE

**Cav\_OK Family Office,** Charlotte, NC  
*Wealth management Intern* Summer 2025 - Present

- Assisted with client onboarding, portfolio reporting, Black Diamond onboarding, Excel, QuickBooks, and RIA portals.
- Gained exposure to investment analysis, estate administration, and client service processes.

#### Golf Caddie

*TPC Potomac Golf Course Potomac, MD* Summers 2023 & 2024  
*Congressional Country Club*  
• Great interpersonal skill learned, Perfected communication skills

#### Waitstaff

*Kenwood Country Club, Bethesda, MD* Summer 2022

#### Camp Counselor, Flag Football Camp

*KOA Sports, Bethesda, MD* Summer 2019

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### LEADERSHIP & ACTIVITIES

- Investment Club, Clemson University
- Certifications: Currently pursuing SIE Exam (expected completion Nov. 2025),
- Intramural Sports: Soccer & Flag Football
- Student PAL group where I tutored students for Introduction to Accounting

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### SKILLS & INTERESTS

- Strong verbal & written communication • Financial calculators & portfolio analysis tools
- Team leadership & collaboration • Microsoft Word, Excel, PowerPoint
- Golfing, Hiking, traveling

# Siya Khimani

(803) 397-9116 | skhiman@clemson.edu | [www.linkedin.com/in/siya-khimani](https://www.linkedin.com/in/siya-khimani)

## EDUCATION

### Clemson University

*B. S. in Financial Management, Minors in Economics and Accounting*

Concentration: Banking and Investments

Clemson, SC

May 2026

## EXPERIENCE

### U.S. Bank

Charlotte, NC

*Derivatives Sales and Trading Intern*

June 2025 - August 2025

- Supported pricing and structuring of corporate and interest rate derivatives, including swaps, caps, and swaptions
- Conducted macroeconomic and yield curve analysis using Bloomberg and Excel, informing hedging strategies for portfolios exceeding \$500M+ in notional value
- Generated 50+ market commentaries and deal pipeline reports across rates, FX, and commodities; enhanced reporting efficiency via Excel automation, reducing turnaround time to <10 minutes

### Stax Payments

Orlando, FL

*Partner Strategy Intern*

May 2024 - August 2024

- Gathered insight on SaaS business partner calls (200+) to build budget and data-tracking systems
- Lead strategy consulting efforts within a dynamic FinTech startup valued at \$ 1B+
- Reduced reporting times for financial records by 20% by implementing Excel shortcuts into specified databases

### Clemson University

Clemson, SC

*Business/Fiscal Student Assistant*

March 2024 - May 2024

- Assisted with administrative tasks related to financial operations, including data entry and document preparation
- Reconciled departmental expenditures and revenues (\$30k+) to ensure compliance with University financial policies
- Maintained detailed records for 60+ Clemson University employees for efficient data management and reporting

## ACTIVITIES

### Clemson FinTech

Clemson, SC

*Founder, Co-President*

November 2023 - August 2025

- Founded Clemson's Fintech Club to cultivate a community of 150+ students interested in financial technology
- Generated \$1,500+ in club sponsorships from various Fortune 500 companies
- Effectively leveraging connections to cultivate valuable opportunities for member professional development

### Project Assistant

Clemson, SC

*Seasonal*

October 2023 - July 2025

- Managed debt schedules totaling \$ 750K+ while assisting with the approval of over \$1.7MM in loans
- Performed analysis of expected cash flows to determine optimal project choice for specific investor profiles
- Documented meeting proceedings and discussions to ensure accurate record-keeping and facilitated project growth

### Clemson Finance Seminar

Clemson, SC

*Student Participant*

November 2023 - December 2023

- Utilized DCF Modeling to evaluate business performance
- Prepared analysis of various financial statements using Excel modeling over the course of the seminar
- Compared the effectiveness of financial metrics to determine the most optimal situationally

### Avista & CO

Lexington, SC

*Mock Entrepreneurial Startup*

May 2021- January 2023

- Performed market research to oversee business models while ensuring the profitability of a fully functional business
- Designed optimal product marketing for maximum customer engagement
- Leveraged Excel to create mock financial statements (\$100K+) following GAAP principles

## ACHIEVEMENTS & INVOLVEMENT

**Clubs and Organizations:** Clemson FinTech (Founder, Co-President), Clemson AI (Marketing Coordinator), Clemson Consulting, Clemson Financial Management, Women in Business, Clemson University Investment Banking Club,

**Skills:** Excel, Power BI, Power Query, Data Inventory Systems, Economics, Bloomberg, Islamic Studies, Hindi

**Interests:** Yoga, Fragrance-Enthusiast, Self-Care, Trivia, Fashion

# Sascha Kling

337 East Killarney Lake • Moore, SC 29369 • sklingh@clemson.edu • 864-345-5598

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## EDUCATION

### Clemson University – College of Business

*Bachelor of Science in Economics*

*Minor: Accounting*

Cumulative GPA: 3.54

**Clemson, SC**

*May 2026*

### Clemson University – College of Business

*Bachelor of Science in Financial Management*

*Emphasis: Corporate Finance*

Cumulative GPA: 3.54

**Clemson, SC**

*May 2026*

### CEA CAPA Plaça Catalunya

*School of Record: University of New Haven*

**Barcelona, Spain**

*January 2025 – May 2025*

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## WORK EXPERIENCE

### Magna International

*Finance Intern*

**Greenville, SC**

*Summer 2025*

- Managed and recorded tariff data totaling over \$1M, supporting cross-functional groups with accurate financial information to drive key business decisions.
- Leveraged SAP to track and analyze daily losses at a new facility, identifying root causes and supporting operational improvements.
- Assisted in streamlining and consolidating repetitive invoice procedures, collaborating with different departments and tech suppliers to reduce processing time by 90%.

### Tecfys

*Finance and Operations Intern (start-up)*

**Barcelona, Spain**

*Spring 2025*

- Adapted to a fast-paced start-up environment, managing both financial and operational tasks in Spanish to support growth.
- Collaborated directly with the CFO on various financial projects, providing critical support and insights.
- Conducted financial analysis of company financial statements to assess potential business partnerships and investment opportunities.
- Employed Microsoft Power BI to create and maintain financial dashboards, enhancing data visualization and decision-making processes.
- Utilized Excel and Holded for managing financial data, including invoices, POs, and financial forecasting.

### Magna International

*Finance Intern*

**Greenville, SC**

*Summer 2024*

- Utilized SAP to help manage business operations and provide future operations forecasts.
- Participated in cross-functional teams to support organizational initiatives, fostering a collaborative work environment.
- Contributed to successful completion of audits by preparing accurate documentation and supporting materials.
- Supported the annual budgeting process by analyzing historical trends and forecasting future expenses.

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## LEADERSHIP and SERVICE

### Team Captain – Bloomberg Global Trading Challenge

**Fall 2024**

- Led one of Clemson's teams in managing a \$1M virtual fund.

### BMOC (Big Man on Campus) Representative

**Fall 2022**

- Participated in philanthropic events, maintained a social media presence, and raised \$10,000 for ZTA's cancer research fund.

# Charlotte Koch

(716) 331-9404 | [ckoch3@clemson.edu](mailto:ckoch3@clemson.edu) | [www.linkedin.com/in/charlottekkoch](https://www.linkedin.com/in/charlottekkoch)

## EDUCATION

### Clemson University

*B.S. in Accounting and Financial Management*

**Concentration:** Commercial Banking and Investments

Clemson, SC

May 2026

## EXPERIENCE

### The Bank of Princeton

*Accounting and Commercial Lending Intern*

Princeton, NJ

June 2025 – August 2025

- Performed daily reconciliations for key institutional accounts including REIT, FHLB, EBA, FRB, and GUDPA, ensuring consistency, accuracy, and balance.
- Executed overnight borrowings ranging from \$5–15 million, maintaining sufficient liquidity across operational accounts.
- Assisted in the preparation of Call Reports, ensuring regulatory compliance and accuracy.
- Collaborated with the Credit and Commercial Lending team, gaining knowledge in loan evaluation, credit risk, underwriting, monitoring, and portfolio management.

### Arthur M. Spiro Institute for Entrepreneurial Leadership

*Operations Intern*

Clemson, SC

March 2025 – Present

- Assist in planning and executing networking events and investor pitch competitions while managing operational data in Excel to support emerging startups.
- Develop analytical and strategic problem-solving skills through collaboration with founders, investors, and industry professionals.
- Gain hands-on experience in entrepreneurship and innovation, enhancing data management, industry knowledge, and professional network.

### Koch Metal Spinning

*Financial Data Analyst Intern*

Buffalo, NY

December 2024 – January 2025

- Analyzed income statements and balance sheets, identifying key financial performance metrics and maintaining financial data integrity.
- Utilized JobBoss ERP to track and input purchase orders (POs), ensuring consistency through manufacturing, monitoring inventory movement, and reconciling costs.
- Posted finalized PO transactions to the general ledger, ensuring accurate expense allocation, financial reporting, and adherence to internal controls.

### The Divine Clothing

*Founder*

Buffalo, NY

May 2020 – Present

- Founded a sustainable clothing business, repurposing old garments to reduce the fashion industry's environmental impact.
- Scaled to 50+ customers through strategic pricing, market research, and personalized engagement across multiple platforms.
- Built a conscious consumer brand through social media marketing, word-of-mouth promotion, and hands-on financial and business planning.

## ACHIEVEMENTS & INVOLVEMENT

**Clubs:** Clemson FinTech, Wall Street South Investment Club, Market Trend Research Club, Women in Business, Women in Economics

**Certificates:** Financial Modeling and Valuation Analyst (FMVA) Corporate Finance Institute®, Startup / e-Commerce Financial Model & Valuation, DCF Valuation Modeling

**Awards:** President's List – 4.0 GPA (Fall 2024, Spring 2024, Spring 2025), Youth Chinese Test Award Winner, Shark Tank Pitch Winner (HS Pitch Competition), Clemson University ELE Elevator Pitch Winner

**Skills:** Bloomberg Terminal, Excel (Advanced), Power BI, Prologue Financials, JobBoss ERP, Data Analysis, Financial Analysis, Budgeting, Administrative Efficiency, Entrepreneurial Expertise, Strategic Thinking, Time Management, Customer Service, Promotion Development

# Saylor D. Koon

skoon@clemson.edu • (803) 960-5529 • www.linkedin.com/in/saylorkoon

## Education

### Clemson University, College of Business

May 2026

*Bachelor of Science in Financial Management*

*Minors: Accounting and Legal Studies, Emphasis: Financial Planning*

Cumulative GPA: 3.2/4.0

## Work Experience

### JP Morgan

Plano, TX

*Global Finance & Business Management Summer Analyst*

Summer 2025

- Utilized Excel and Powerpoint to analyze financial data, identify trends, and provide insights
- Assisted in the development and execution of strategic business plans by delivering highly customized and comprehensive solutions to senior leadership and relevant stakeholders
- Drafted research summaries and recommended alternatives to neighboring data teams

### LINKED! Permanent Jewelry LLC

Clemson, SC

*Owner/Founder*

January 2024- Current

- Formed and launched a service company for individuals seeking a tangible alternative to a tattoo
- Utilize welding technology to fabricate and manipulation of non-ferrous metals
- Manage/produce financial statements, bookkeeping, funding through VC's & angels, and employee count

### Pipeline

Remote

*Operations Support Summer Analyst*

Summer 2024

- Served founders and C-Suite executives with their CRM platforms and and sales pipeline process
- Utilized AI technology to monitor and create social media coverage and maintain company blog
- Constructed company blog from scratch and managed daily customer relations outreach

### Southern Med Pediatrics

Lexington, SC

*Pediatric Records Assistant*

January 2022 - August 2023

- Effectively utilized EclinicalWorks software to update and manipulate patient profile information
- Organized/managed patient medical records and communicated patient dismissals
- Engaged with surrounding practices and patients to maintain medical data and integrity

## Leadership

### National Alzheimer's Buddies Club

Clemson, SC

*President*

August 2023 - Current

- Scaled a club of volunteers from 7 to 100 active members
- Conduct monthly HIPAA trainings and manage volunteer and nursing home activity schedules

### Clemson ACC Leadership Symposium

University of Virginia

*Delegate*

November 2024

- Chosen as one of five representatives from the entire undergraduate student body
- Collaborated with ACC schools to develop reallocation plans for University Equity Center funding

## Certifications

### SIE Exam

Anticipated: November 2025

### Bloomberg Finance Fundamentals

Clemson, SC

*Credential ID: UwGgxxVSwHcNC81zRxqatnP9*

February 2025

### Bloomberg Market Concepts

Clemson, SC

*Credential ID: hapTxL5g73Gp1p8XtrXW8ncy*

February 2025

### SC Welding Fabrication License

Lexington, SC

June 2022

# Victoria Claire Leopold

vcleopold2018@gmail.com • (703) 967-4794

## OBJECTIVE

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Student seeking to apply strong analytical, data management, and problem-solving skills in a financial data analytics or analyst role, with a focus on turning complex information into actionable insights.

## EDUCATION

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**Clemson University, Wilbur O. and Ann Powers College of Business** **Clemson, SC**  
*Honors Bachelor of Science in Accounting and Financial Management* May 2026  
*Minor: Political Science, Emphasis: Corporate Finance*  
*Cumulative GPA: 3.4*

**London School of Economics and Lorenzo de Medici University** May–August 2024  
*Study Abroad Program: London, England and Florence, Italy*

## WORK EXPERIENCE

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**First Command Financial Planning** **Alexandria, VA**  
*Financial Planning Intern* December 2024

- Explored a foundational knowledge of financial planning, including personalized investment strategies and insurance solutions
- Analyzed client profiles to align financial goals with risk tolerance and investment opportunities
- Gained insight into data-driven client acquisition and portfolio optimization

**Clemson Office of Budgets and Financial Planning** **Clemson, SC**  
*Financial Management Intern* January–June 2024

- Performed reconciliations for budget balance, fund balance, mismatched BVA transfers, cash transfers, and adaptive amendments in multiple departments for university wide projects
- Helped compile and direct the management of annual student fee application and revision process
- Supported resource allocation decisions for specific departmental projects while collaborating with senior budget analysts

**Clemson Gunnin Architecture Library** **Clemson, SC**  
*Library Assistant* Dec 2022– Present

- Organize a collection of over 800,000 books and materials, improving accessibility
- Assist individuals with digital databased and inter-library loan processes through data management

## ORGANIZATIONS AND SERVICE

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**Deans Global Leadership Program** Nov 2024 – Present

- Engaging in immersive learning experiences and specialized classes focused around skill building initiatives to address global challenges and enhance cross-cultural communication

**Wilbur O. and Ann Powers College of Business Leadership Signature Program** January 2024 – January 2025  
*Year One Leader*

- Led new members to be integrated into the program, created a OneDrive guide to improve website navigation, and strengthened communication through team-building exercises

**Delta Delta Delta** January 2024 – February 2025  
*Director of Academic Excellence*

- Managed GPA improvement initiatives, resulting in a 3.6 GPA average for the chapter
- Tracked academic progress and personalized check-ins

## SKILLS

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**Computer software/ frameworks:** Microsoft Office, Workday Adaptive, Tableau, PowerQuery, PowerBI  
**Business Analysis:** Financial Statement Analysis, Problem Solving, A.I. Applications, Financial Reconciliations

# HEATHER M. LEWELLEN

(612)-518-3654 | he414@gmail.com | linkedIn.com/in/heather-lewellen

## EDUCATION

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

**Clemson, SC**  
May 2026

## WORK EXPERIENCE

**Ameriprise Financial, Inc.**

**Minneapolis, MN**

*Fund Accounting Intern*

June 2025 - Aug. 2025

- Reconciled and balanced daily cash and security holdings positions for 3 mutual funds.
- Ensured accurate daily calculation and reporting of NAVs, maintaining 100% accuracy rate.
- Completed month-end reports by reviewing and confirming accurate financial information for 3 funds.

**NorthRock Partners Financial Advice Firm**

**Minneapolis, MN**

*Finance Intern*

May 2024 - Aug. 2024

- Managed and updated a data set of over 2,600 clients/advisor relationships bi-weekly, utilizing advanced Excel formulas to compare and analyze current data, ensuring accuracy and timeliness.
- Processed 3 to 15 vendor invoices daily with meticulous attention to detail, maintaining accuracy.
- Generated individual advisor compensation and new business bonus reports by sorting through Excel documents and exporting relevant data.

**Marriott International, Inc. Kip's Irish Pub & Restaurant**

**St. Louis Park, MN**

*Server*

June 2023-Present

- Applied multitasking skills to manage detailed accounting paperwork, communicate effectively with clientele and all areas of the business, and deliver food and beverage orders in a friendly, timely manner.
- Reconcile micros and written receipts through completing a detailed report, ensuring accuracy in financial records, and resolving discrepancies.

**Peer Assisted Learning (PAL) Leader**

**Clemson, SC**

*Tutor*

Jan. 2024-May 2024

- Offered learning support and study strategies for all students enrolled in Business Calculus.
- Plan and facilitate 2 eighty-minute sessions a week for 25-40 Business Calculus students.
- Guided students through problem solving and acquiring the skills necessary to be successful in the course.

## LEADERSHIP EXPERIENCE

**Clemson University Guide Association**

**Clemson, SC**

*Tour Guide*

Oct. 2023 - Present

- Navigated a 5-round interview process, being selected as one of the 53 candidates out of 450 applicants.
- Connect with 10-15 prospective students and families while conducting 1-3 informative tours a week.

**ClemsonLIFE**

**Clemson, SC**

*Mentor/Volunteer*

Jan. 2024 - Present

- Coach my mentee through daily conversation to strengthen their confidence in social settings.
- Work with a ClemsonLIFE student to discuss goals that will help propel them into the job world and independent living.

## HONORS AND AWARDS

Clemson University Dean's List, Spring 2023, Fall 2023, Spring 2025



**ADAM C. LIPPERT**  
302 Farmers Market Street, Taylors, SC 29687  
(716) 713-4916  
clippert747@gmail.com

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## EDUCATION

**CLEMSON UNIVERSITY**  
**Bachelor of Science - Finance**  
Emphasis: Corporate Finance  
Minor: Accounting

Clemson, SC  
May 2026  
GPA: 3.53 (overall)

**PURDUE UNIVERSITY**  
**Bachelor of Science - Finance**

West Lafayette, IN  
Freshman Year  
GPA: 3.58 (overall)

## EXPERIENCE

**THE FINANCIAL GUYS**  
**Summer Intern - Wealth Management**

Buffalo, NY  
Summer 2025

- Observed client meetings to learn about professional conduct and servicing clients
- Assisted in completion of backend spreadsheets and documents to meet record-keeping regulations

**ALLIANCE ADVISORY GROUP**  
**Summer Intern - Wealth Management and Insurance**

Buffalo, NY  
Summer 2025

- Helped wealth managers with investment allocation decisions and sales processes
- Learned about business processes and operations and how best to serve clients in financial advising

**GRASSROOTS CONTRACT INTERIORS**  
**Crew Member**

Buffalo, NY  
June - August 2024

- Operated under time constraints to meet project deadlines
- Learned about small business operations and management

**COOKIES AND CREAM ICE CREAM SHOP**  
**Crew Member**

Buffalo, NY  
June to August – 2025, 2023, 2022

- Responsible for balancing and closing the cash register
- Provided guidance to store management on inventory management strategies

**CANISIUS HIGH SCHOOL**  
**Game Design and Animation Summer Program Leader**

Buffalo, NY  
July 2023 and 2024, June – 2022 and 2021

- Taught the basics of code and animation
- Learned leadership and management skills such as methods of presenting information and conflict resolution

**CHARACTERISTICS** Fast learner, Hard worker, Sociable, Eager to please

**SKILLS** Microsoft Software suite knowledge, Bloomberg Terminal experience, Tableau, PowerBI

**INTERESTS** Travel, Animation, Astronomy, Football

**ORGANIZATIONS** Clemson Catholic Tigers

**CERTIFICATIONS** NYS Life, Accident, and Health Agent/Broker License Series 17-55

# Joey Lisotta

(916) 824-9358 ▶ [jlisott@clemson.edu](mailto:jlisott@clemson.edu) ▶ [LinkedIn](#)

## EDUCATION

Bachelor of Science in Financial Management

Clemson University

Emphasis: Corporate

Minor: Accounting

Relevant Coursework: FIN Management I & 2, Intermediate FIN ACCT I & 2, FIN Institute & Markets, Principles of Real Estate, Investments in Real Estate, Investment Analysis

Spring 2026  
Clemson, SC  
GPA: 3.41/4.00

Tri-County Technical College

Major: University Transfer

Fall 2022- Fall 2023  
Pendleton, SC  
GPA: 3.80/4.00

## WORK EXPERIENCE

### Research Analyst Internship

CBRE

June 2025-August 2025  
Greenville, SC

- Conducted in-depth market research and competitive analysis on commercial real estate trends, including office and industrial sectors in the Greenville-Spartanburg metropolitan area
- Compiled and analyzed data from multiple sources (CoStar, internal databases, and economic reports) to identify market patterns and forecast trends
- Assisted in creating quarterly market reports and client presentations highlighting key real estate metrics, vacancy rates, absorption, and rental growth
- Utilized Excel and CBRE proprietary tools to develop data visualizations for internal and client use

### Restaurant Server

Truffles Cafe

May 2023- Jan 2024  
Bluffton, SC

- Greeted customers and ensured a welcoming dining experience
- Anticipated customer needs proactively, showcasing customer service excellence and problem-solving skills
- Trained new employees, highlighting leadership and team collaboration abilities
- Managed large parties efficiently, upwards of ten people, reflecting time management and organizational skills

## HONORS AND ACTIVITIES

Clemson Finance Club

Clemson Bass Fishing Club

Clemson Real Estate Club

Clemson Dean's List

Tri-County Tech's President List

Tri-County Tech's Dean List

Fall 2024-Present  
Fall 2024-Present  
Fall 2024-Present  
Spring 2025  
Fall 2022  
Spring 2023 & Fall 2023

## TECHNICAL SKILLS

Proficient: Excel, Adobe Express, Microsoft Office, Costar

Basic: Tableau, Power BI

# Ginger Mastrosimone

(631) 697-0369 · [gmastro@clermson.edu](mailto:gmastro@clermson.edu)

## EDUCATION

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**Clemson University – College of Business**  
*Bachelor of Science in Financial Management*  
*Minor: Accounting*  
*Emphasis: Corporate Finance*  
GPA: 3.41/4.00

**Clemson, SC**  
Spring 2026

**Lorenzo de Medici Study Abroad Program - Florence, Italy**

Spring 2024

## WORK EXPERIENCE

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**Student Finance Assistant**

**Clemson, SC**

*Clemson University*

Spring 2025 - Present

- Served as first point of contact by greeting visitors, answering questions, and directing students and faculty to appropriate resources
- Assisted professors and staff with administrative and finance-related tasks as needed
- Supported a professional office environment by managing communications and workflow

**In The Shed Restaurant**

**Sayville, NY**

*Waitress*

Summer 2023 - 2025

- Delivered excellent customer service by taking orders, serving food and beverages, and addressing guest needs promptly
- Managed multiple tables in a fast-paced environment while ensuring accuracy and efficiency
- Collaborated with team members to maintain smooth operations and a positive dining experience

## LEADERSHIP EXPERIENCE

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**Think Strong**

**Clemson, SC**

*VP of Finance*

Spring 2025 - Present

- Managed the organization's budget, maintained accurate financial records, and provided updates to leadership
- Oversaw fundraising efforts to support events and mental health awareness initiatives
- Collaborated with the executive board to allocate funds and ensure financial sustainability

**Alpha Chi Omega**

**Clemson, SC**

*Study Abroad Chair*

Fall 2023 – Fall 2024

- Guided members through the study abroad application process by coordinating resources and timelines
- Held informational sessions and shared opportunities to promote global education within the chapter
- Served as a point of contact between members and university study abroad staff to support successful experiences

## OTHER

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Dean's List – Spring 2023, Fall 2023

Computer Skills: Excel, Word, PowerPoint, JMP

## CONNOR MCCRUDDEN

115 Bridgeport Lane | Lexington, SC 29072 | USA

+1 (706) 202-2122

cjmtitans310@gmail.com

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### EDUCATION

**Clemson University, College of Business**  
Bachelor of Science in Financial Management  
Minor: Accounting, Emphasis: Real Estate

Clemson, SC  
December 2025  
GPA: 3.54/4.0

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### EXPERIENCE

**Montarion Capital**  
*Associate*

Lexington, SC  
September 2022 - Present

- Control property management responsibilities for 20+ properties across 5 states, including insurance, maintenance, expenses and income.
- Oversee contractors for building and repairs, ensuring the projects are done correctly, in a time efficient manner with superior results.
- Handle relations and action with companies such as the IRS, Dominion Energy, and Lloyds of London.
- Modeled profit and loss reports for various properties in excel and did basic underwriting on prospective properties.
- Valued potential land acquisitions and ran comps on other properties to find the most effective home size and lot density allowances.

**The Klockner Group**  
*Project Manager*

Columbia, SC  
May 2022/23 - August 2022/23

- Manage day to day operations around the facility in conjunction with Senior Partners.
- Handle account management for various contractors and business partners
- Handled all deliveries to the property and made sure the property was well maintained both inside and outside the building in every aspect.

**Pine Cove Chimney Point**  
*Counselor/Head Ropes*

Westminster, SC  
May 2024/25 - August 2024/25

- Worked alongside 80 college students to implement a program that promoted a fun, safe, and unique experience for over 1000 customers.
  - Led and trained a team of 25 college students to safely operate high risk activities for over 1000 customers with 0 near-misses or close calls reported while interacting with families and meeting their needs
- 

### ACTIVITIES & INTERESTS

**Activities:** Clemson FCA, Intramural Sports, Recreational Volleyball Club

**Interests:** Golf, Soccer, Traveling, Clemson Sports, Real Estate, Personal Finance

# Aidan McNulty

5 Locust Lane, Huntington, NY 11743 | 516-727-0277 | [aidan.mculty24@gmail.com](mailto:aidan.mculty24@gmail.com)

## EDUCATION

### Clemson University

Clemson, SC

*Bachelor of Science in Financial Management, Minor in Accounting*

*Emphasis in Commercial Banking and Investments*

Expected May 2026

- **Relevant Coursework:** Financial Institutions and Markets; Intermediate Financial Acct II; Financial Management II; Business Law

### CEA CAPA

Barcelona, Spain

- **Relevant Coursework:** Investment Analysis; Financial Statement Analysis

January– May 2025

## WORK & LEADERSHIP EXPERIENCE

### Seaport Global Holdings LLC

New York, NY

*Capital Markets Workshop Participant*

June 2025

- Selected from a competitive pool for an intensive capital markets workshop at a mid-sized investment bank
- Networked with 30+ professionals across trading, sales, research, and IB, turning a two-week virtual program into two weeks of in-person shadowing on the corporate bond desk through proactive networking

### URS Capital Partners

Huntington, NY

*Summer Analyst*

May 2025, July 2025 – August 2025

- Analyzed \$100M+ in potential acquisitions by evaluating financials, tenant cash flows, and market data
- Built and stress-tested Excel models (IRR, equity multiple, cash-on-cash) to evaluate performance across scenarios
- Prepared investment materials synthesizing market trends and financial performance for senior partners

### Huntington Crescent Club

Huntington, NY

*Caddie*

May 2023 – Present

- Consistently requested by members for trusted course strategy and green reading, including advising a client who won the Member Guest Championship Flight
- Built strong relationships with high-value individuals, honing client service and relationship management skills
- Awarded a caddie scholarship of \$2,000 for professionalism, reliability, and ability to deliver value under pressure

### CEA CAPA – Study Abroad

Barcelona, Spain

*Sim Portfolio Manager*

January 2025 – May 2025

- Managed a \$50,000 simulated equity portfolio, delivering a +5% return by analyzing global markets, sector rotations, and company fundamentals
- Allocated capital across equities and ETFs (GS, JPM, NVDA, VOO, QQQ), gaining hands-on exposure to risk management, portfolio construction, and trade execution

### Clemson Men's Lacrosse

Clemson, SC

*Attack*

January 2023 – Present

- Team Captain of 55+ members; led by example fostering accountability and team culture
- Earned All-Conference Attack honors in back-to-back seasons for consistent top performance

## SKILLS, ACTIVITIES & INTERESTS

- **Activities:** Wall Street South Investment Club, Phi Sigma Kappa (Recruitment Officer), Water Sport Club
- **Hard Skills:** Microsoft Office Suite, Bloomberg Terminal, Financial Modeling
- **Certifications:** Bloomberg Market Concepts, SIE (In Progress)
- **Interests:** Investing, boxing, endurance challenges, golf, travel, poker (U.S. & European cash games)

# Jake Mercer

Greenville, SC | (302)-922-1329 | ja.mercer@icloud.com

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## OBJECTIVE

Seeking a real estate or finance position to apply analytical, problem-solving, and presentation skills. Eager to contribute to a dynamic team and gain practical experience in commercial real estate, investment strategies, and financial analysis.

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## EDUCATION

### Clemson University

*Bachelor of Science* in Financial Management

Minor: Accounting

Emphasis: Real Estate

Clemson, SC

Aug 2022 - May 2026

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## ACTIVITIES AND INVOLVEMENT

### Finance Club

*Member*

Clemson, SC

Aug 2024 - Present

- Attend club meetings with opportunities to network and engage with industry professionals.

### Real Estate Club

*Member*

Clemson, SC

Aug 2024 - Present

- Actively participated in club meetings and events, gaining knowledge of the real estate market.

### Delta Chi Fraternity

*Member*

Clemson, SC

Nov 2023 - Present

- Networking and collaborating with 100+ members to organize social and philanthropic events.
- 

## WORK EXPERIENCE

### NAI Earle Furman

*Intern*

Greenville, SC

June 2025 - Aug 2025

- Gained hands-on experience in tenant representation, site selection, and lease negotiation support in an educational commercial real estate environment.

### PMC Valet

*GSA*

Greenville, SC

June 2025- Aug 2025

- Provided professional valet services in fast pace settings, ensuring top-tier customer service and vehicle safety.

### Grill Marks

*Server*

Greenville, SC

May 2025 - Aug 2025

- Delivered exceptional customer service in a high-volume restaurant environment, ensuring guest satisfaction and repeat business.

### Sunnyside Café

*Server*

Clemson, SC

May 2024 - Nov 2024

- Managed multiple tables simultaneously in a fast-paced environment, maintaining a high standard of service under pressure. While still continuing my education.

### Northeast Seafood Kitchen

*Host / Takeout / Busser*

Bethany Beach, DE

May 2023 - Aug 2023

- Executed daily checklists to ensure all front-of-house areas, including waiting areas and menus were clean, organized, and ready for service.

### Pats Select

*Server*

Smyrna, DE

Sep 2021- June 2022

- Collaborated with kitchen staff and other team members to ensure timely food delivery.

# Zachary R. Mercer

zacharymerc14@gmail.com | (925)-683-8012 | [www.linkedin.com/in/zachary-merc14](https://www.linkedin.com/in/zachary-merc14)

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## EDUCATION

**Clemson University, Powers School of Business** | Clemson, SC

*May 2026*

*Bachelor of Science in Financial Management*

Minor: Accounting

Emphasis Area: Financial Planning

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## CERTIFICATIONS

- Securities Industry Essentials (SIE) Exam – FINRA, 2024
- Series 66 - In progress (Expected 2025)
- California Insurance Producer License – Life, Accident & Health, California Department of Insurance, 2025

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## RELEVANT WORK EXPERIENCE

**Consolidated Planning** | Charlotte, NC

*June 2025 – July 2025*

*Financial Representative Intern*

- Developed customized financial plans using The Living Balance Sheet to optimize portfolios and communicate strategies to clients
- Simplified complex financial concepts and guided clients toward long-term goals through education and planning
- Executed targeted marketing and networking efforts to identify prospects, expand client base, and generate business opportunities.

**Fisher & Wiens Wealth Management** | Danville, CA

*May 2024 – July 2024*

*Financial Management Intern*

- Produced and dispersed a market update video shared to over 250 households
- Conducted in-depth analysis of the current portfolio and implemented diversification strategies to adapt to market changes
- Evaluated structured products for strategic risk hedging, ensuring stability through market downturns

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## LEADERSHIP & INVOLVEMENT

**Clemson Financial Planning Club** | Clemson, SC

*September 2024 - Present*

*Member*

- Networked with professionals to learn about the CFP® designation and best practices for taking the exam
- Participated in speaker sessions and panel discussions with top financial advisors
- Engaged with professionals from top financial firms to learn industry strategies and best practices in wealth management

**Scholars of Finance** | Clemson, SC

*January 2025- Present*

*Member*

- Completed the Leadership Development Program, enhancing leadership skills and preparing for impactful roles in finance
- Promoted values-based leadership through engagement in discussions on ethics, integrity, and responsible finance
- Participated in mentorship programs connecting with finance professionals to foster personal and professional growth

**Beta Alpha Psi** | Clemson, SC

*January 2024 – Present*

*Finance and Accounting Honors Society Member*

- Peer tutored over 10 hours a year to finance and accounting students
- Attended bi-monthly meetings with top finance and accounting firms around the country
- Attended seminars, networking events, and service projects within the local community

**Phi Sigma Kappa** | Clemson, SC

*January 2024 – January 2025*

*Logistics Chairman*

- Utilized Excel to organize and manage files related to logistics, ensuring efficient tracking and easy access to information
- Closely collaborated with the treasurer to ensure a streamlined financial process by organizing and maintaining financial records
- Constantly dispersing important information to entire fraternity fostering transparency and effective communication

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## SKILLS & INTEREST

The Living Balance Sheet | Tableau | Power BI | Power Query | Microsoft Excel | Microsoft Office Suite  
All Mountain Snow Skiing | Triathlons | Baseball | Golf | Health and Fitness | San Francisco Giants | College Athletics

# Jacob S. Musick (Jake)

(803) 426-0011 | [jmusick@g.clemson.edu](mailto:jmusick@g.clemson.edu) | [linkedin.com/in/jakemusick](https://www.linkedin.com/in/jakemusick)

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## EDUCATION

**Clemson University**  
Bachelor of Science in Financial Management  
Minor: Accounting  
Emphasis: Corporate Finance

**Clemson, SC**  
Aug 2022 – May 2026  
GPA: 3.40 / 4.00

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## EXPERIENCE

**Student Assistant | Department of Finance**  
Clemson University, Powers College of Business

**Clemson, SC**  
Nov 2023 – May 2025

- Collaborated with professors and department staff to provide services to students and visitors
- Analyzed data and provided AI research, contributing to a published study paper entitled "How Much Does ChatGPT Know About Finance" by Douglas Fairhurst and Daniel Greene

**Finance Intern**  
ProSource Technical Services

**Aiken, SC**  
Jul 2024 – Aug 2024

- Reconciled purchase orders to billing statements using QuickBooks and Salesforce to ensure accuracy
- Classified and tracked invoices for more than \$200,000 in billing and 10 clients across the country

**Real Estate Intern**  
Keller Williams Real Estate, Tami Eichelberger

**North Augusta, SC**  
Jan 2022 – Mar 2022

- Gained insight into the lead generation process of real estate agents
- Developed knowledge regarding the effect of high interest rates and market dynamics on home sales

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## LEADERSHIP & CAMPUS INVOLVEMENT

**Scholars of Finance, VP of Marketing & Outreach (2024-2025)**

Oct 2023 – Present

- Promoted club membership and awareness through targeted social media content
- Completed the 7-week Leadership Development Program (LDP) designed to prioritize and learn skills to become a principled financial leader

**Clemson Table Tennis Club, President (2024)**

Aug 2022 – Present

- Oversaw club finances and activities while working directly with Clemson's Director of F&O
- Expanded club space and equipment, leading to an 80% overall growth of attendance
- Nurtured a welcoming environment where all backgrounds felt comfortable and encouraged to join

**Financial Management Association, Member**

Aug 2024 – Present

- Operated with peers to analyze market trends and corporate finance case studies
- Participated in professional development events to build knowledge of capital markets and risk management

**Fellowship of Christian Athletes (FCA) President (2022)**

Aug 2022 – Present

- Partnered with local churches to get resources for the high school campus
- Provided weekly content and speakers for each meeting

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## TECHNICAL SKILLS

MS Office: Excel, PowerPoint, Word | QuickBooks | Salesforce | Tableau | Power BI

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## **Brock Niemeyer**

[brn1133@hotmail.com](mailto:brn1133@hotmail.com) - (414)-704-0692 - [www.linkedin.com/in/brockniemeyer/](https://www.linkedin.com/in/brockniemeyer/)

### EDUCATION

**Clemson University**, Clemson, SC  
*Bachelor of Science in Financial Management*  
*Minor: Accounting, Emphasis: Real Estate*

Cumulative GPA: 3.48/4.0  
December 2025 Graduation Date

**Roanoke College**, Salem, VA

August 2021 - May 2022

### WORK EXPERIENCE

**Aline Capital**, Greenville, SC

June 2025 – August 2025

*Commercial Real Estate Advisory Intern*

- Worked on summer-long project with MHRV team on River Rocks Landing RV Park.
- Compiled market data and sales comps to assist in property valuations and investment analysis.
- Assisted with pro forma for multiple listings, including income projections, expense estimates, and investment returns.
- Shadowed experienced professionals in meetings, cold/warm calls, and negotiations to gain firsthand knowledge of the commercial real estate transaction process.

**The Cliffs at Keowee Falls**, Salem, SC

May 2022 – May 2025

*Cart Attendant*

- Enhanced golf experience and fostered genuine relationships with members.
- Managed carts, bags, and range while communicating with staff and pros.
- Trained and oversaw new employees.

**M&M Detailing**, Upstate South Carolina

May 2023 - August 2023

*Car/Boat Detailer*

- Completed freelance customer requests of detailing interior/exterior of vehicles.

**J&B Painting Co**, Cedarburg, WI

May 2021 - August 2021

*Painter*

- Showcased attention to detail while following safety and cleanliness protocols.

### CLUBS & ORGANIZATIONS

**Clemson Finance Club**

Fall 2024 - Present

**Clemson Real Estate Club**

Fall 2024 - Present

**Wall Street South Investment Club**

Fall 2024 - Present

**Kappa Sigma Fraternity**

Fall 2022 - Present

**Roanoke College Leadership Fellows**

Fall 2021 – Spring 2022

**Roanoke College NCAA Men's Lacrosse**

Fall 2021 – Spring 2022

### HONORS & AWARDS

**ODAC Conference Academic All-American**

2021- 2022

**Clemson University President's List**

Fall 2022 and Spring 2023

**Clemson University Dean's List**

Fall 2023

### TECHNICAL SKILLS

Microsoft Word, Excel, PowerPoint, Power Query, Power BI, Alteryx, Tableau, SQL (basic understanding), CoStar, LandGlide, Salesforce, Seamless AI

# Caitlin Zofia Nozka

Carlstadt, New Jersey | (973) 908-9503 | cnozka@gmail.com | www.linkedin.com/in/caitlin-nozka

## EDUCATION

<b>Clemson University</b>	Clemson, South Carolina
Bachelor of Science in Financial Management	May 2026
<i>Emphasis in Financial Planning</i>	GPA: 3.6/4.0
Bachelor of Science in Accounting	
Honors: President's List	Spring 2023, Fall 2023
Dean's List	Fall 2022, Spring 2024

## RELATED EXPERIENCE

<b>Enterprise Mobility</b>	Elizabeth, New Jersey
<i>Accounting Intern</i>	May 2025 – August 2025

- Assisted with core accounting functions by recording general ledger transactions, coding invoices, and submitting journal vouchers. Compiled and shared daily revenue reports with all branches while contributing to additional accounting projects as needed.
- Ensured compliance and accuracy in daily operations by maintaining detailed documentation of transactions, expense reports, and supporting records for audits and management review.
- Maintained consistent attendance and punctuality to support time-sensitive processes such as month-end close, journal entry submissions, and financial statement preparation.

<b>Vision Financial Planning</b>	New York, New York
<i>Financial Planning Intern</i>	May 2024 – August 2024

- Supported the Certified Financial Planner in managing the financial planning process for a portfolio of 236 clients. Activities included servicing accounts, conducting financial analysis, managing client relationships, and overseeing risk management.
- Utilized technology including Redtail CRM, Morningstar Advisor Workstation, NetX360, and Wealthscape to analyze client account portfolios.
- Interacted with clients and wealth managers from Pershing and Fidelity, which included documenting all communications. Notified clients of overdue payments to address insurance policy delinquencies and confirming account activity.

<b>Enterprise Rent-A-Car</b>	Wallington, New Jersey
<i>Sales &amp; Customer Service Representative</i>	May 2023 – August 2024

- Facilitated the rental agreement process for approximately 20 customers daily, ensuring accuracy, compliance, and a seamless customer experience.
- Administered customer service consultations, reviewed both positive and negative feedback and assessed each complication to develop a proper solution.
- Participated in the Enterprise Rent-A-Car Emerging Women Leaders Conference.

## PROFESSIONAL DEVELOPMENT & SKILLS

**Organizations:** Tau Mu Lambda, Beta Alpha Psi, Alpha Chi Omega, Women in Business, Finance Club, Student Chapter of the Institute of Management Accountants, Think Strong  
**Language Skills:** Bilingual with proficiency in Polish, fluent speaker  
**Leadership Positions:** Beta Alpha Psi – Recording Secretary, Alpha Chi Omega – Assistant Vice President of Recruitment Information

## VOLUNTEER WORK

<b>Wallington Pulaski Memorial Association</b>	Wallington, New Jersey
<i>General Volunteer/Former Junior Miss Polonia (2016)</i>	April 2016 – Present

- Assisted in the creation of the annual fundraising journal, using applications such as Microsoft Word, Microsoft Publisher, and Microsoft Excel.
- Served as the liaison for the Wallington Pulaski Memorial Association, after being crowned the 2016 Junior Miss Polonia. Represented Wallington at various community/organizational events, spoke at various public speaking events, and led the town of Wallington down Fifth Avenue in New York City.

# Shane C. O'Malley

Shanecolin88@yahoo.com | (224) 388-1242 | www.linkedin.com/in/shane-omalley-cu/

## EDUCATION

### Clemson University Honors College

*Bachelor of Science in Financial Management and Accounting*  
*Emphasis: Corporate Finance*

May 2026  
Clemson, SC  
GPA: 3.84/4.00

### Programme at University of Oxford

*Clemson Business Study Abroad: Oxford Programme*

July 2024  
Oxford, England

- Completed coursework in Business Law and Cost Accounting
- Engaged in expert-led presentations on special relations, geopolitical risk, and climate change

### Gateway to World Markets: New York City (FIN 4990)

*Clemson Business Directed Study*

May 2024  
New York City, NY

- Interacted with professionals from 13 different financial services firms, gaining insights into industry practices

## PROFESSIONAL EXPERIENCE

### Bank of America

*Financial Analyst (FMAP) Intern*

June 2025-Aug 2025  
Charlotte, NC

- Supported CCAR procedures for the Global Markets Stress Testing Team by gathering and organizing financial data
- Completed two analytical projects resulting in an improved model development approach

### Vivint Smart Home

*Door-to-Door Sales Agent*

May 2023-June 2023  
Chicago, IL

- Collaborated with sales team of 40 plus to develop effective sales strategies
- Connected with over 50 customers daily at their doorstep, providing product information and customer service support

### Barrington Hills Country Club

*Caddie*

June 2023-Aug 2024  
Barrington, IL

- Regularly interacted with members and guests, most of who are highly successful business leaders
- Provided proactive attention to detail, enhancing member experience and earning several promotions

## BUSINESS ORGANIZATIONS AND CLUBS

### Financial Management Association | Vice President

Sep 2023-Present

- Led recruitment efforts, increasing membership by 75% in the club's second year on campus
- Coordinate guest speaker events and technical skills workshops with the executive team

### Scholars of Finance | Vice President of Financial Operations

Jan 2024-Present

- Administer the chapter's general ledger and strategically organize fundraising initiatives
- Work with leadership team in allocating chapter's annual \$1,000 budget

### Wall Street South Investment Club | Member

Sep 2024-Present

- Manage a global portfolio simulation featuring stocks, bonds, mutual funds, ETF's, options, and futures
- Analyze financial statements, market trends, and economic indicators to form investment strategies

### Investment Banking Club | Member

Jan 2024-Present

- Involved in discussions and presentations regarding financial forecasting concepts
- Research and analyze market trends and investment patterns from successful investors

### Bloomberg Trading Competition | Team Member

Oct 2023-Dec 2023

- Utilized technical analysis to identify investment opportunities based on cyclical natures of stock
- Placed in the top 15% of 2000 plus teams from over 300 universities and 38 countries

## HONORS AND CERTIFICATIONS

Bloomberg Market Concepts

Wall Street Prep Financial Statement Modeling, Discounted Cash Flow Modeling

Seal of Biliteracy: Bilingual Proficiency in Swedish

## CASSIDY ORBE

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### CAREER OBJECTIVE

Skilled in Excel and detail-oriented analysis, seeking a full-time role in finance or risk management to contribute to data accuracy, regulatory compliance, and process improvement.

### EDUCATION

**Bachelor of Science in Financial Management**

Minor in Accounting, Emphasis in Corporate Finance

*Clemson University*

Language: Proficient in Spanish

**May 2026**

Clemson, SC

GPA: 3.68/4.00

### EXPERIENCE

**Finance Summer Analyst**

**June 2025 - August 2025**

*Citi* New York City, NY

- Assisted the Finance Transformation Quality Assurance Testing & Validation (QATV) team in validating risk weights under the Basel III Standardized Approach
- Conducted testing of financial data using Excel, creating custom formulas to ensure accuracy and compliance with regulatory standards
- Supported senior team members by reviewing Basel III requirements and applying them to test case validations
- Contributed to quality assurance processes to improve accuracy and reliability of regulatory reporting

**Intern**

**May 2024 - August 2024**

*Tenor Digital* Fort Lauderdale, FL

- Implemented Excel models of the competitive landscape
- Business Development, including defining market segments, creating prospect lists, and utilizing LinkedIn for prospective client outreach
- Identified marketing opportunities to enhance the firm's outreach and client acquisition strategies
- Assisted the sales team on calls three times a week, contributing to the software sales process and engaging with prospective clients

### CLUBS

**Beta Alpha Psi**

**September 2024 - Present**

*Member* Clemson, SC

- International honors organization for accounting, finance, and information systems students
- Attend weekly meetings to gain insight into professional development and networking with industry professionals
- Participate in community service events

**Finance Club**

**January 2024 - Present**

*Member* Clemson, SC

- Attend meetings throughout the semester to gain insight into the financial industry

**Women's Club Basketball**

**August 2022 - Present**

*Treasurer* Clemson, SC

- Manage the teams' finances and collect payments from the players at the beginning of the season
- Conduct fundraisers to raise money for tournaments and traveling

### HONORS AND CERTIFICATIONS

Professional Development Certification

**July 2024**

Bloomberg Market Concepts Certification

**January 2025**

Clemson University Dean's List

**December 2022 - May 2025**

# CAMILLA OSTBYE

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## EDUCATION

### Clemson University

Bachelor of Science in Financial Management

Minors: Accounting & Management, Emphasis: Corporate Finance

- GPA: 3.95/4.00
- Awards: President's List (Dec 2022, May 2023, Dec 2023, & Dec 2024), Dean's List (May 2024 & May 2025)

Clemson, SC

August 2022 – December 2025

## PROFESSIONAL EXPERIENCE

### RDM Financial Group at Hightower

Wealth Management Intern

- Participated in weekly Investment Strategy Committee meetings to discuss market developments
- Analyzed fixed-income holdings and identified opportunities to replace underperforming corporate bonds with higher-yield alternatives, aligning with client investment objectives
- Conducted market research to identify industry tailwinds and evaluate companies with strong growth potential

Wealth Management Intern

- Participated in client meetings and assisted in relevant personal data gathering to create financial plans
- Learned how to use industry software such as eMoney (financial planning) and Tamarac (investment management & client reporting)
- Generated performance reports for clients on the status of their financial accounts for use in portfolio review meetings
- Assisted with investment research by analyzing market data and financial reports to support investment decisions
- Collaborated with other interns across Hightower's national advisory network to present ideas for better operational effectiveness within the company
- Gained client organization and segmentation skills in Salesforce/CRM system

### PureBarre

Intern- Selected for a one-month internship prior to graduating high school

- Designed flyers and assisted with social media to attract new customers
- Contacted customers via phone and email to ensure satisfaction
- Scanned items into inventory, organized retail space, as well as cleaned and sanitized studio areas and storefront

### Scout & Molly's

Sales Associate

- Managed all customer transactions during allotted shifts
- Balanced the cash register at the beginning and end of shifts to ensure accuracy in daily sales
- Managed social media by posting three times a week to advertise and sell merchandise
- Coordinated the layout and organization of the store to present an appealing shopping environment

## PROJECTS & OUTSIDE EXPERIENCE

### Builder's Beyond Borders

Mentor & Head of Photography Team

- Raised \$3,000 each year for the service trip in consecutive years (discontinued after 2021 due to COVID-19)
- Collaborated with 25 team members during trips to build a school (Guatemala 2019) & housing (Costa Rica 2020)
- Completed local community service to qualify for participation
- Served as a mentor for new members joining the team and was head of the photography team for the trip
- Communicated with local community members in Spanish and helped translate for the team

## ACTIVITIES

### Delta Zeta Sorority

Recruitment Committee Member

### Beta Alpha Psi

Member of the Honor Society for Finance and Accounting

### Women in Business & Finance Club

Club Member

Clemson, SC

August 2022 – Present

Clemson, SC

September 2024 – Present

Clemson, SC

January 2024 – Present

## SKILLS

Certifications: Bloomberg Market Concepts (BMC), Spanish Seal of Biliteracy

Skills: Tamarac, eMoney, Salesforce CRM, Python, Bloomberg, Microsoft Office, Morningstar

Languages: English (native), Spanish (intermediate), Portuguese (intermediate)

# Aiden Peacock

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## EDUCATION

**Clemson University, College of Business**

**Clemson, SC**

*Bachelor of Science in Financial Management*

May 2026

*Minor: Accounting    Emphasis: Corporate Finance*

Cumulative GPA: 3.95 | Finance GPA: 4.00

- Entered the University as a Sophomore on Credits
- President's List: Fall 2024, Spring 2024, Spring 2025

## WORK EXPERIENCE

**Santander Bank, N.A.**

**Boston, MA**

*Commercial Banking Intern*

Jun – Aug 2025

- Assisted in credit underwriting processes, spreading audited and company-prepared financials in nCino, updating covenant compliance, and performing client due diligence with LexisNexis and OFAC screening.
- Conducted financial analysis on corporate portfolio account management files, building Excel models to evaluate revenue streams, loan/deposit balances, and product penetration; identified trends and presented insights to senior bankers.
- Developed and pitched a SharePoint-based product knowledge platform to Product Management and Sales leadership, improving internal efficiency and enabling client-facing teams to offer Santander's solutions more effectively.

**Prime Point Property Management**

**Greater Boston, MA**

*Associate / Account Manager*

Oct 2024 – Present

- Using Wave Accounting, reconciling accounts to match bank statements, keeping a General Journal

**Ocean State Job Lot**

**Kingston, MA**

*Summer Associate*

Jun – Aug 2024

- Assisted with logistics and sales operations during the store's peak season, cross-trained with sales floor management and customer service

## RELEVANT COURSEWORK

**FIN 3120 – PRO-FORMA EBITDAs and AI**

- Worked with AI in Anaconda to field company 10-Ks and train a model to predict EBITDA for a given year

**FIN 3050 – Stock Evaluation**

- Using ValueLine, used multiple stock evaluation models to estimate value, make judgements on if the stock was over/undervalued.

## LEADERSHIP AND INVOLVEMENT

Treasurer for the Clemson Hip-Hop Club

Member of Wall Street South Investing, Investment Banking Club, Finance Club, Real Estate Club

## SKILLS, CERIFICATIONS, AND INTERESTS

Skills: Microsoft Office Suite, nCino, Spanish Proficiency, SharePoint

Certificates: Bloomberg Market Concepts, Santander Open Academy – Excel

Interests: Personal Investing, Real Estate Management, Physical Fitness/Sports, Python

# Ian J Peck

ianpeck.j@gmail.com | +1 (843) 412-5238 | www.linkedin.com/in/ianjpeckclemson

## EDUCATION

### Clemson University

Bachelor of Science in *Financial Management*

Minor in *Accounting*

- Finance Club
- SIE Examination (In Progress)

Clemson, South Carolina

Anticipated May 2026

## PROFESSIONAL EXPERIENCE

### Ronald McDonald Charity Foundation

*Grant Writing & Development Intern*

- Successfully invited and pitched the foundation's mission to Secretary Hammond at our annual gala
- Built partnerships with 20+ local businesses through cold outreach
- Learned how to successfully write/apply for both local and national grants

Greenville, South Carolina

August 2024-December 2024

### CBRE

*Industrial Intern*

- Conducted and presented market research to senior industrial team members on a weekly basis
- Accompanied Brokers on site tours and meetings with owners and tenants
- Cold Outreached with over 500+ businesses and handled individual lunch meetings with prospective new clients

Charleston, South Carolina

May 2025-August 2025

### Herron Farms

*Engineering Intern*

- Shadowed a team of engineers, marketing specialists, scientists, and computer programmers to gain insight into day-to-day operations of a startup
- Acquired in-depth understanding of startup functionality and business operations, including investor attraction and the process of transitioning from an idea to a fully operational business
- Participated in real-life examples of the engineering process and gained practical knowledge of applicable engineering practices

Charleston, South Carolina

October 2021-March 2022

### Kenai Cache Outfitters

*Fly fishing guide/outfitter*

- Managed daily operations of a fly-fishing guide service, including outfitting customers, fixing reels, providing advice to clients, and conducting guided tours
- Learned new skills such as operating a drift boat, navigating a hostile environment with often interaction with bears and moose and effective client communication and management
- Demonstrated strong critical thinking skills while ensuring the safety of others

Cooper Landing, Alaska

June 2022-August 2022

## SKILLS

**Computer:** SolidWorks, Excel, PowerPoint, Autodesk Products, Bloomberg terminal Proficiency, Finmark, CRM systems

**Other:** Social Media Promotion, Leadership, Bear Management, Grant Writing, Financial Modeling, Public Speaking.

## INVOLVEMENT

### Delta Sigma Pi

*Professional Fraternity*

- Underwent an extremely competitive recruitment process, being selected among 27 out of 500+ applicants.
- Developed professional soft skills and networking abilities

Kappa Tau Chapter

(January 2024-Present)

### Phi Gamma Delta

*Social Fraternity*

- Gained leadership experience
- Leverage relationships and connections to secure bands, event agreements, and philanthropic partners

Chi Alpha Chapter

(January 2024-Present)

# Dominic Pedicino

dominicpedicino@gmail.com • (469)-404-2115 • [www.linkedin.com/in/dominicpedicino](http://www.linkedin.com/in/dominicpedicino)

## Education

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<b>Clemson University</b>	Bachelor of Science in Financial Management Emphasis in Wealth Management Minor: Accounting	May 2026
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## Honors

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Eagle Scout	2019
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- Earned 40 Merit Badges, leadership of younger scouts in an Eagle Project involving building fences

## Experience

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<b>Legion Aviation – Intern;</b> Dallas, TX	June 2025 – August 2025
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- Researching aircraft by calling brokers, reviewing JetNet and visiting brokerage websites
- Expanding my network and knowledge of aviation by getting exposure to aircraft and maintenance

<b>Bravo Aviation – Intern;</b> Dallas, TX	July 2025
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- Learning about how an aircraft maintenance shop works and the types of inspections they do
- Learning about the different roles performed by the staff to get aircraft repaired safely and efficiently

<b>Alumni Hall Stores – Keyholder;</b> Clemson, SC	August 2023 - Present
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- Performing inventory audits, receiving and labeling shipments, organizing the store
- Completing closing tasks including closing registers, taking out deposits, and cleaning the store

<b>Rally House – Associate;</b> Dallas, TX	April 2022 - July 2024
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- Organizing merchandise, helping customers, pulling orders, and cleaning the store
- Aiding managers with closing tasks, ensuring store was ready for opening the next day

## Activities

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<b>Clemson Financial Planning Club</b>	March 2024 - Present
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- Learning about certifications like Certified Financial Professional (CFP), and their required courses
- Hosting local financial professionals, learning about their work and career paths

<b>Clemson Sailing Club</b>	August 2022 – Present
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- Learned how to properly rig and maneuver 420 model and keelboat sailboats

## Additional Information

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**Computer Skills:** Microsoft Excel, Word, PowerPoint, experience with Bloomberg Terminals and JetNet  
**Languages:** Spanish (fluent)



# COLIN PENTECOST

[Cpentec@clemson.edu](mailto:Cpentec@clemson.edu) | (404) 922-6637 | [www.linkedin.com/in/colinpentecost](http://www.linkedin.com/in/colinpentecost)

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## EDUCATION

### **Bachelor of Science in Financial Management**

May 2026

*Clemson University*

Minor: Accounting, Emphasis: Corporate Finance

Clemson, SC

GPA: 3.23/4

## WORK EXPERIENCE

### **Commercial Finance Intern**

May 2025 – July 2025

*Techtronic Industries – TTI*

Anderson, SC

- Developed and implemented a Power BI dashboard that automated the balance sheet reconciliation process, streamlining manual tasks and improving efficiency
- Built Snowflake SQL scripts to extract and transform data from SAP, providing the underlying dataset that powered the reconciliation dashboard
- Presented project findings and dashboard solution to company executives, including two group Presidents, CFOs, and VPs, demonstrating business impact and technical expertise.

### **Boating Attendant**

May 2024 – August 2024

*Keowee Key Property Owner's Association*

Salem, SC

- Assisted in managing inventory and operational costs, contributing to cost-saving initiatives
- Maintained accurate records of member activity, payments, and financial transactions to ensure transparency, accountability, and effective financial management for the organization

### **Guest Advocate**

October 2021 – May 2022

*Target*

Woodstock, GA

- Processed daily transactions at the cash register, ensuring accuracy and efficiency in handling payments
- Optimized front-of-store operations to reduce wait times while resolving guest inquiries and complaints, enhancing overall customer satisfaction

## COMMUNITY ENGAGEMENT

### **Youth Group Mentor**

August 2018 – May 2022

*Woodstock City Church*

Woodstock, GA

- Led weekly small group discussions for middle school students and provided mentorship and guidance on faith and personal growth
- Organized and facilitated group activities and events

### **Volunteer**

July 2025

*Accept. Inspire. Minister*

Anderson, SC

- Partnered with TTI Finance team and fellow interns to stock the food pantry and build shelving, expanding storage capacity and supporting AIM's mission to serve the local community.

## CAMPUS INVOLVEMENT

### **Finance Club**

August 2024 – Present

Member

- Attended resume review sessions, club meetings, and club organized career placement events

## SKILLS

Microsoft Excel   Microsoft PowerPoint   Power BI   Snowflake   SAP

# Ryan Perez-Cubas

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## Education

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<b>Clemson University - Wilbur O. and Ann Powers College of Business</b>	<i>Clemson, SC</i>
<i>Bachelor of Science in Financial Management</i>	<i>May 2026</i>
<i>Minor in Accounting, Concentration in Corporate Finance</i>	<i>GPA: 3.1/4.0</i>

## Relevant Experience

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<b>ScanSource</b>	<i>Greenville, SC</i>
<i>Financial Services Intern</i>	<i>May 2025 - August 2025</i>

- Underwrote partner companies to evaluate credit risk and recommend trade credit limits
- Entered and analyzed partner financial statements in Excel; updated records in SAP
- Shadowed a Financial Analyst II daily; supported release of individual orders up to \$500k
- Gained exposure to bad debt reserve processes and financial reconciliations

## Certifications

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- |  |                          |
|--|--------------------------|
| <ul style="list-style-type: none"><li>• Securities Industry Essentials (SIE)</li></ul> | <i>Sitting Fall 2025</i> |
|--|--------------------------|

## Technical Skills

### Financial Data and Analysis

- Excel, Power BI, Bloomberg

### Business Systems

- SAP, Experian, Salesforce

## Student Involvement

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<b>Finance Club</b>	<i>August 2025 - Present</i>
<ul style="list-style-type: none"><li>• Network with finance professionals through hiring events and Resume Book</li><li>• Attend Fall Recruiters BBQ to connect with recruiters</li></ul>	

<b>Wall Street South Investment Club</b>	<i>August 2024 - Present</i>
<ul style="list-style-type: none"><li>• Manage a \$100,000 simulated investment portfolio allocated across various securities</li><li>• Develop skills in trading and portfolio management using Bloomberg terminals</li></ul>	

<b>Pi Kappa Alpha Fraternity - Eta Alpha</b>	<i>March 2023 - Present</i>
<ul style="list-style-type: none"><li>• Serve on recruitment committee to attract and onboard new members</li><li>• Participate in fundraising for annual Operation Red Wings charity supporting veterans</li></ul>	

Jack Perrini  
(516) 662-5577  
[jtperrri@clemson.edu](mailto:jtperrri@clemson.edu)

## Education

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**Clemson University**  
*Bachelor of Science in Financial Management*  
*Emphasis in Commercial Banking and Investments*  
*Minor in Accounting*

**Clemson, South Carolina**

*Graduation: May 2026*  
*GPA: 3.76/4.0*

## Employment History

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**Rosecliff Ventures**  
*Investment Analyst Intern*

**Manhattan, New York**  
*June 2025- July 2025*

- Selected to support the investment team in conducting financial due diligence on potential deals, including analysis of financial statements, market trends, and competitive positioning.
- Assisted with in-depth market research to evaluate industry dynamics, risks, and growth opportunities.
- Contributed to deal-sourcing efforts by identifying investment opportunities, tracking emerging technologies, and engaging with industry professionals through conferences and networking.

**Worldwide Wealth Group**  
*Brokerage Intern*

**Manhattan, New York**  
*May 2024- August 2024*

- Assistant to a licensed broker who sold equities, options, futures, and index universal life insurance
- Set up PowerPoint presentations for supervisor to utilize during sales meetings
- Participated in team discussions on investment strategies, gaining exposure to asset allocation and risk management practices

**Mill Pond Properties, LLC**  
*Assistant Property Manager*

**Bellmore, NY**  
*May 2024- August 2024*

- Oversee all aspects of strip mall rental property
- Show vacant space to prospective tenants
- Collect monthly rent(s) from tenants
- Tackle tenant(s) concerns and resolve any issues

**Garden City Country Club**  
*Caddy*

**Garden City, NY**  
*May 2023- August 2024*

- Connected with a diverse range of golfers, enhancing my communication and interpersonal skills through meaningful interactions with individuals of all ages and backgrounds
- Gained insight into business practices by interacting with professionals and their clients during rounds, facilitating networking opportunities, and understanding business etiquette
- Built a strong reputation within the golf club as members specifically requested my services
- Provided golfers with detailed insights into the course layout, optimizing their strategy and enhancing their overall game experience

## Leadership

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Clemson Alpha Lambda Delta Honors Program  
National Junior Honor Society  
Diversity on Wall Street (DOWS)  
Clemson Top Soccer Program- Help disabled children play soccer by teaching and encouraging them

## Skills

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Excel, AI, Financial Modeling, Critical Thinking, Decision-Making, Team Management

# Daniella Pokorny

Mount Juliet, Tennessee  
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(714) 887- 4995  
[www.linkedin.com/in/daniella-pokorny](https://www.linkedin.com/in/daniella-pokorny)

## EDUCATION

**Clemson University** **Clemson, South Carolina**  
Bachelor of Science in Financial Management *May 2026*  
Emphasis in Corporate Finance *GPA:3.8/4.0*  
*Minor: Computer Science & Accounting*  
**Awards:** President's List *Fall 2023, Spring 2024, Fall 2024*  
Dean's List *Spring 2023, Spring 2025*

**Bond University** **Gold Coast, Australia**  
The Education Abroad Network (TEAN): Bond University *May 2025- August 2025*

## WORK EXPERIENCE

**Clemson University FP&A Office** **Clemson, South Carolina**  
*Finance and Operations Intern Jan 2025- Present*

- Conduct weekly reconciliations and budget development checks to ensure accuracy and alignment with financial goals for Clemson University's FP&A office.
- Developed and implemented a forecasting method to analyze unit-level financial forecasts, improving predictive accuracy and operational planning.
- Sole finance intern supporting the FP&A team by delivering detailed financial analysis and process improvements to enhance budget management and reporting.

## INVOLVEMENT

**Wellness Society** **Clemson, South Carolina**  
*Treasurer Present*

- Appointed as the inaugural Treasurer for CU Wellness Society, responsible for establishing the club's financial processes and budget framework.
- Preparing to oversee financial operations to ensure accuracy and accountability as the organization grows.

**Alpha Chi Omega** **Clemson, South Carolina**  
*Member August 2022- Present*

- Actively contribute to weekly chapter meetings, philanthropic efforts, and campus-wide events.
- Participate in fundraising events for domestic violence awareness, supporting local charities.
- Collaborated with sorority members in social events, fostering a strong sense of community and teamwork.

**Women in Business** **Clemson, South Carolina**  
*Member Jan 2024- Present*

- Involved in networking events with industry professionals, gaining insights into business leadership and career advancement.
- Attended skill-building workshops focused on resume writing, public speaking, and financial literacy.

## SKILLS

- Proficient in Excel (advanced functions, pivot tables, data analysis)
- Intermediate Python programming for data analysis and automation
- Basic knowledge of C/C++.

## CERTIFICATIONS

**Securities Industry Essentials (SIE) Exam** **Completed: November 11,2024**

**Capital IQ Pro 101 Certification** **Completed: August 4, 2025**

# JOHN SPIRO RAGUCCI

Tewksbury, MA | (978) 888-4318 | jsragucci@comcast.net | www.linkedin.com/in/john-ragucci

## EDUCATION

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### Clemson University, Powers College of Business

*Bachelor of Science in Financial Management*

*Minor: Accounting, Emphasis: Commercial Banking and Investments*

Clemson, SC

May 2026

### Semester Abroad, IES Milan

Milan, Italy

January – May 2025

## WORK EXPERIENCE

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### Purchase Order Intern

ALKU

Andover, MA

June – July 2025

- Working with Account Managers and clients to ensure sufficient PO funding.
- Tracking spent & remaining amounts against POs, along with creating invoice adjustments based on PO funding.
- Utilizing Bullhorn and Burn Report to analyze POs and inputting data.

### Software Engineer Intern (2022) / Research & Development Intern (2021)

Thermo Fisher Scientific

Tewksbury, MA

July – August 2022 / July – August 2021

- Analyzed source code to help minimize costs for functionality issues.
- Assisted with creating software programs with Mocha framework features & Ramina Process Analyzer.
- Collaborated effectively with members of a software development team and personnel in other departments.
- Brainstormed with an engineering team to determine appropriate code testing processes.

### Residential Community Mentor

Clemson University

Clemson, SC

July 2024 – Present

- Fostered community engagement and student learning by developing personal relationships with residents, leading community-building activities, and supporting leadership organizations within Clemson Home.
- Provided resources and support by connecting students with Clemson University resources, promoting academic success through faculty engagement.

### Pro Shop Assistant

Trull Brook Golf Course

Tewksbury, MA

May 2020 – May 2025

- Administered point of sales applications and trained new team members in customer service and operations.

## SKILLS

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**Software:** Fundamental Understanding of Java, Python, JavaScript, C++, CSS, & HTML

**Language:** Basic Italian

**Personal:** Critical Thinking, Problem Solving, Customer Service, Leadership, & Organization

## ACTIVITIES, AWARDS, & INTERESTS

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**Activities:** Finance Club, Wall Street South Investment, Financial Management Association, Chess Club, & Real Estate Club

**Awards:** John and Abigail Adams Scholarship (MA) & President of National Honor Society (HS)

**Interests:** Investing, Golf, Chess, Sports, & Traveling

# Quinn Raymond

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## Education

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### CLEMSON UNIVERSITY- WILBUR O. AND ANN POWERS COLLEGE OF BUSINESS

*Bachelor of Science in Financial Management*

*Minor in Accounting*

*Emphasis Area: Real Estate*

Dean's List (Fall 2022 – Spring 2025) | Presidents List (Spring 2023)

*Clemson, SC*

*May 2026*

*GPA: 3.72/4.0*

### Oxford University – Magdalen College

*Summer 2026*

*GPA: 4.0/4.0*

## Involvement & Leadership

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### Staff Writer – Clemson Law Review

*Clemson, SC*

*Fall 2025-Spring 2026*

- Researched and analyzed complex legal issues to draft publishable articles and case notes.
- Developed strong legal writing skills, ensuring clarity, accuracy, and citation compliance under professional standards.
- Demonstrated time management by balancing research and writing deadlines with academic coursework.

### Clemson Pre-Law Society

*Clemson, SC*

*Fall 2024-Present*

- Networked with attorneys, professors, and admissions representatives to gain insight into the legal world.
- Engaged in discussions and speaker events on legal careers, local policy issues, and law school preparation.
- Participated in workshops focused on LSAT preparation and legal ethics, reinforcing analytical reasoning and public speaking skills.

### Clemson Finance Club

*Clemson, SC*

*Fall 2024-Present*

- Collaborated with peers to evaluate investment opportunities and present findings in group discussions.
- Strengthened quantitative and analytical skills through exposure to real-world financial case studies.

## Awards & Experience

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### Portfolio Management

- 3 Month Simulated Portfolio Management: Jan-Apr 2025(\$10,000): Managed a 10-security portfolio, outperforming SPY over a volatile semester. Finished ranking 7 out of 145 portfolios.

*Clemson, SC*

*Spring 2025*

### Bloomberg Terminal Experience

- Performed Fundamental Analysis: Individual Securities, Mutual Funds, Bonds, Yield Curves

*Clemson, SC*

*Spring 2025*

### Johns Hopkins Applied Physics Laboratory Merit Scholarship Awardee

*Clemson, SC*

*Fall 2022 – Present*

# SOPHIA RENNA

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HTTP:WWW.LINKEDIN.COM/IN/SOPHIA-RENN

## ABOUT ME

I'm a motivated finance student with minors in Accounting and Brand Communications. I have experience in commercial real estate investment analysis through my internship at Matthews Real Estate Investment Services and in entrepreneurship as the founder of Sophisticase, an e-commerce brand specializing in accessories. As VP of Leadership Development for Scholars of Finance, I organize professional development programs, coordinate guest speakers, and lead team initiatives. I'm detail-oriented, driven, and passionate about building meaningful relationships and delivering results.

## ACADEMIC ACHIEVEMENTS

Clemson Academic Scholarship  
Barnes & Noble Academic Scholarship  
Pam Hendrix Study Abroad Scholarship

## ACTIVITIES & LEADERSHIP

### Alpha Chi Omega Sorority (Fall 2022 - present)

- Chairperson: My Journey and Dance Battle Coordinator
  - Organized fundraisers, including Walk-A-Mile and Domestic Violence Awareness campaigns.
  - Planned events such as Clemson Christmas for Kids and Panhellenic Dance Battle.
- Vice President of philanthropy assistant
  - Organized and founded the first 'Dancing in her shoes' event for Alpha Chi Omega
  - Raised over \$18,000 for Domestic Violence Awareness - Safe Harbor Greenville SC

### Professional & Academic Organizations

- Scholars of Finance (Fall 2024 - Present)
  - Executive board member - VP of leadership development
  - Hosts weekly meeting, and coordinates guest speakers to mentor and engage new members
- Women in Business at Clemson (Fall 2022 - Present)
- Think Strong (Fall 2022 - Present)
- Clemson Finance Club (Fall 2024 - Present)

## SKILLS

- Technical: Advanced Excel, Canva, Power Point
- Languages: Basic Spanish
- Organization
- Time Management
- Creativity

## EDUCATION

### Clemson University, Clemson SC

- Bachelor of Science in Financial Management - Real estate
- Minor: Accounting & Brand Communications

GPA: 3.4/4.0

Graduation: May 2026

Study Abroad: Spring 2024, Instituto Lorenzo de' Medici, Florence, Italy

## WORK EXPERIENCE

### Real Estate Investment Sales Trainee Summer 2025 Matthews Real Estate Investment Services, New York, NY

- Participated in intensive 8-week training focused on commercial real estate investment sales, valuation, and market analysis.
- Created Offering Memorandums (OMs) and Broker Opinion of Value (BOV) reports for potential clients under guidance of brokerage team.
- Researched property data, comparable sales, and market trends using tools like CoStar and internal platforms.
- Attended educational meetings and workshops to develop skills in underwriting, prospecting, and investment strategy.

### Marketing & Communications Intern Fall 2024-Present Clemson University - Department of Campus Recreation, Clemson, SC

- Creates promotional materials and manages social media accounts to increase engagement.
- Collaborates with staff to develop new recreational programs tailored to student interests.
- Collects and analyzed participant feedback to improve program offerings.

### Sales Associate & Social Media Intern May 2023-Present Mixology Clothing Company, Westhampton Beach, NY

- Developed and posted content for TikTok and Instagram.
- Delivered exceptional customer service and drove sales through product knowledge and engagement.
- Processed sales transactions, managed returns, and handled customer inquiries.

## OTHER

sophisticase - <https://sophisticase13.myshopify.com/>

- Custom design tote bags and phone cases
- Tailored designs for any occasion

# JACK ROBINSON

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## EDUCATION

### CLEMSON UNIVERSITY- WILBUR O. AND ANN POWERS COLLEGE OF BUSINESS

*Bachelor of Science in Financial Management*

*Minor in Accounting, Emphasis Area: Real Estate*

Dean's List (Spring 2024, Fall 2024)

Clemson, SC

Spring 2024 - May 2026

GPA: 3.46/4.0

### CLEMSON BUSINESS IN OXFORD PROGRAMME

*Completed coursework in Cost Accounting and Global Business Negotiation & Dispute Resolution*

*Gained exposure to weekly speakers from leading finance and business organizations, expanding global perspective*

*Traveled across the United Kingdom, Switzerland, and Amsterdam, developing cultural awareness and adaptability*

Magdalen College, Oxford University

Summer 2025

GPA: 4.0/4.0

### ARIZONA STATE UNIVERSITY- W.P. CAREY SCHOOL OF BUSINESS

*Major in Economics B.S.*

Dean's List (Spring 2023 - Fall 2023)

Tempe, AZ

Fall 2022 - Fall 2023

GPA: 3.50/4.0

## WORK EXPERIENCE

### ROUND HILL CLUB

*Golf Caddie*

Greenwich, CT

Summer 2024

- Delivered exceptional customer service by assisting members with course navigation, club selection, and game strategies, enhancing their overall experience.
- Developed strong interpersonal and communication skills by building rapport with members and fostering meaningful connections.
- Demonstrated reliability and professionalism by consistently arriving prepared and maintaining focus throughout long, physically demanding days.

### INNIS ARDEN GOLF CLUB

*Grounds Crew*

Greenwich, CT

Summer 2023

- Maintained the appearance, functionality, and aesthetics of the golf course to ensure a high-quality experience for members and guests.
- Collaborated with a team of 16 employees, demonstrating effective communication and teamwork to ensure smooth daily operations.
- Performed tasks such as bunker maintenance and environmental stewardship to preserve course integrity and sustainability.

### THE MILBROOK CLUB

*Camp Counselor*

Greenwich, CT

Summer 2022

- Served as a camp counselor for children aged 6-11 at the Milbrook Club, prioritizing their safety and well-being.
- Supervised and guided children through daily activities, creating a fun and engaging environment.

## INVOLVEMENT AND LEADERSHIP

### KAPPA SIGMA FRATERNITY

*Arizona State and Clemson University member*

Tempe, AZ and Clemson, SC

Fall 2023 - Present

- Member of Kappa Sigma fraternity at Arizona State University in Fall 2023, embracing leadership, camaraderie, and community values.
- Transitioned to the Clemson chapter in Spring 2024, integrating seamlessly and fostering connections with new members.
- Contributed to fraternity initiatives by actively participating in events and promoting a supportive brotherhood culture.

### ARIZONA STATE MEN'S CLUB LACROSSE

*Midfielder on Team*

Tempe, AZ

Fall 2022- Fall 2023

- Competed as a member of a Club Lacrosse team at the MCLA Division 1 level, demonstrating commitment and athletic excellence.
- Participated in a rigorous training schedule, including 3 practices per week during the fall and 6 practices per week in the spring, along with twice-weekly morning workouts.
- Developed strong time management skills by balancing a demanding athletic schedule with academic responsibilities.
- Strengthened teamwork and communication abilities by collaborating with teammates to achieve common goals on and off the field.



# NOLAN ROCK

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## EDUCATION

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**Clemson University, College of Business**

August 2022 - May 2026

- *Bachelor of Science in Financial Management*
- *Bachelor of Science in Accounting*
- Emphasis: Commercial Banking & Investing
- Cumulative GPA: 3.5

## WORK EXPERIENCE

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**Amazon (AWS), Seattle, WA**

May 2025 - August 2025

*Financial Analyst Intern*

- Built and deployed a fluctuation analysis dashboard monitoring \$100M+ in monthly activity across 75+ accounts, leveraging 2,700+ logic rules to flag irregular variances and improve financial accuracy.
- Performed comprehensive 5-year aging analysis on 100,000+ financial transactions, enabling improved cash flow forecasting, risk assessment, and enhanced accuracy in long-term financial reporting.
- Engineered automated journal entry workflows using a software tool, saving over 60 hours per annum while significantly enhancing accuracy and efficiency in month-end financial close processes.

**FRSCPA, Cary, NC**

May 2024 - August 2024

*Accounting Intern*

- Redesigned cash flow template used by 100+ clients, delivering clearer financial insights that supported better decision-making and drove increased client satisfaction.
- Enhanced bookkeeping accuracy and efficiency by systematically inputting financial data into spreadsheets and databases, ensuring timely and reliable maintenance of financial records.
- Helped in maintaining accurate financial records for clients, performing data entry, and conducting basic financial analysis to identify trends or discrepancies.

**Webacy, Remote**

March 2024 - May 2024

*Cybersecurity and Blockchain Analyst*

- Conducted comprehensive due diligence on 15+ Web3 firms, including detailed analysis of business models, market positioning, and growth potential.
- Analyzed Web3 security competitors, delineating their product offerings, strategic market placement, and consumer insights to spotlight potential market disruptors.
- Worked both autonomously and with colleagues from across the globe to meet 4-week ambitious deadline.

## ACTIVITIES & LEADERSHIP

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- **Team Leader**, FDC (Culture & Performance) Department Leader - Leadership Signature Program, *Wilbur O. and Ann Powers College of Business*
- **Participant**, Clemson University Creative Inquiry – Stock Pitch Challenge
- **Volunteer**, Note in the Pocket

# Alex Rodrigues

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## EDUCATION

**Clemson University, Wilbur O. And Ann Powers School of Business**

*Bachelor of Science in Financial Management*

*Minor in Accounting, Emphasis in Real Estate*

Clemson, South Carolina

May 2026

GPA: 3.2/4.0

## PROFESSIONAL EXPERIENCE

**Voya Investment Management**

*Intermediary Distribution Intern*

Atlanta, Georgia

June 2025 – August 2025

- Maintained and organized Salesforce CRM pipeline, supporting internal wholesalers in managing hundreds of advisor and brokerage opportunities across multiple territories
- Distributed daily performance reports and weekly private equity updates, ensuring accurate and timely delivery of investment data to wholesalers and Pomona Capital specialists
- Delivered an AI-driven Microsoft Copilot presentation, demonstrating workflow automation to improve sales productivity and client engagement across the desk
- Collaborated with internal wholesalers to prepare externals for client meetings with RIAs, wirehouses, and brokerage firms, helping drive sales coverage and new business opportunities
- Supported private equity outreach campaigns, targeting high-net-worth individuals and generating qualified leads for capital-raising initiatives

**CenTrak (Halma Inc.)**

*Financial Accounting Intern*

Newtown, Pennsylvania

June 2024 – August 2024

- Conducted ERP system testing to validate financial reporting data, increasing accuracy across thousands of transactions
- Completed accounts receivable collections totaling ~\$1.2 million, improving working capital and cash flow
- Accelerated collection of state tax-exemption certificates from customers and partners, ensuring compliance with Halma's corporate audit standards
- Reviewed and cross-referenced purchase and sales orders, ensuring accurate entry into financial systems to maintain data integrity, improve reporting reliability, and reduce the risk of compliance issues

**The Butcher Shop Steakhouse**

*Barback*

Kearny Mesa, California

May 2023 – August 2023

- Delivered proactive, attentive customer service by anticipating guests' needs and enhancing their dining experience

## LEADERSHIP EXPERIENCE

**J. Daniel and Nancy Garrison Sales Innovation Program (SIP)**

*Member*

Clemson, South Carolina

January 2025 – Present

- Selected for a competitive sales program, gaining advanced training in sales techniques, business development, and client relationship management
- Involved in role-playing simulations and real-world case studies, practicing client interactions and business scenarios to strengthen persuasive communication, negotiation, and sales strategy skills in a competitive setting
- Engaged with peers and industry leaders in specialized class coursework focused on sales strategy and execution

**Finance Club**

*Vice President*

Clemson, South Carolina

August 2025 – Present

- Represent the Finance Club at career fairs, recruiter sessions, and campus-wide student organization meetings, serving as an ambassador for Clemson Financial Management students
- Coordinate with recruiters and fellow officers to promote student opportunities and ensure consistent leadership presence

**Pi Kappa Alpha – Eta Alpha Chapter**

*Athletic Director*

Clemson, South Carolina

January 2024 – Present

- Coordinated athletic programming and intramural events for 100+ fraternity members, overseeing scheduling and logistics while promoting teamwork and chapter engagement

## CERTIFICATIONS, SKILLS, AND INTERESTS

**Certifications:** Securities Industry Essentials (SIE) License

**Skills:** Salesforce, Power BI, Excel, Tableau, Microsoft Office

**Interests:** Soccer, Golf, Weightlifting, Traveling, Skiing, Pickleball, Investing, FIFA

# Mark Romano

[mwroman@clemson.edu](mailto:mwroman@clemson.edu) | (770) 689-6495 | [www.linkedin.com/in/mark-romano-19b852219](https://www.linkedin.com/in/mark-romano-19b852219)

## EDUCATION

### Clemson University | Clemson, SC

May 2026

*Bachelor of Science in: Financial Management | Minors in: Accounting and Spanish*

Wilbur O. and Ann Powers College of Business | GPA: 3.74/4.00

- Phi Kappa Tau Fraternity: Founding Member, Mental Health Chair, and Sergeant-at-Arms
- Tutor: Business Calculus I
- Member: Finance Club, Pickleball Club, Table Tennis Club

### Pantheon Institute | Rome, Italy

Summer 2024

- Relevant Coursework: Legal Environment of Business and Global Business Negotiations/Dispute Resolution
- Leveraged Spanish language skills

## PROFESSIONAL EXPERIENCE

### CEEUS | Columbia, SC

Summer 2025

*Business Transformation and Continuous Improvement Intern*

- Worked with business process consultants to optimize the company's helpdesk system functionality used by all 150+ employees leading to a 50% increase in SLA adherence
- Analyzed and visualized 1000+ records of customer ticket data in Excel to identify trends for prospective improvement

### Clemson Club Tennis | Clemson, SC

2024 – Present

*Treasurer and Vice President*

- Supervise the club's financial information such as dues and tournament expenses for a 200+ member club
- Create a presentation for our budgeted \$25,000 that ensures the club's financial stability and present it to the funding board to generate more revenue for the club
- Direct practices of about 50 people each night and organize the tournament schedule for the calendar year

### Wilbur O. and Ann Powers College of Business | Clemson, SC

2024 – Present

*Global Business Ambassador*

- Promote Clemson's international profile by pitching my abroad experience to 150 prospective study abroad students
- Facilitated open Q&A sessions, providing real-time guidance on study abroad opportunities

### Bruster's Real Ice Cream | Atlanta, GA

2020 – 2022

*Sales Representative*

- Led shifts by allocating tasks to workers as well as maintaining efficiency at cash registers
- Opened/closed the store, balanced cash registers at end of shifts, and recorded inventory to send to distributors

## VOLUNTEER EXPERIENCE

### Sandy Springs Mission

Summer 2024

- Non-profit organization supporting at-risk students in Atlanta through academic enrichment, summer camps, and sports programs that build character, teamwork, and life skills

### Charity Pickleball Tournament

Spring 2025

- Coordinated a 50 person pickleball tournament fundraiser and donated \$1,055 proceeds to the Colorectal Cancer Alliance

## CERTIFICATIONS AND ACHIEVEMENTS

**Skills:** Proficient use of Microsoft Excel, Word, Powerpoint, Power BI, Alteryx, and Bloomberg Terminals

**Honors:** President's List (GPA 4.00): Fall 2022 and Spring 2024, Dean's List (GPA 3.50+): Spring 2023, Fall 2023, Spring 2025, Alpha Lambda Delta Honor Society: Spring 2023

**Languages:** Advanced Spanish speaker

**Certifications:** Power BI Specialist: April 2025, Seal of Biliteracy (English and Spanish): Fall 2022

**Interests:** Tennis, Pickleball, Golf, Running

# ELLA ROVAI

Chicago, IL | +1 (708)-237-2709 | [ellarovai@gmail.com](mailto:ellarovai@gmail.com) | [www.linkedin.com/in/ellarovai](http://www.linkedin.com/in/ellarovai)

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## EDUCATION

### Clemson University

Bachelor of Science in Financial Management, Corporate Finance Emphasis

Bachelor of Science in Accounting

Study Abroad: Sant'Anna Institute, Italy

Clemson, SC

May 2026

GPA: 3.61/4.00

Spring 2025

## AWARDS & CERTIFICATIONS

Center for Intl. Studies (CIS) Abroad Academic Merit Scholarship

Spring 2025

Clemson University President's List

Fall 2023

Clemson University Dean's List

Fall 2022 - Spring 2023

Securities Industry Essentials (SIE) Exam Candidate

Expected - Summer 2025

Bloomberg Market Concepts

Spring 2025

Certified Student Leader

Spring 2023

## EXPERIENCE

### Winland Foods

Oakbrook, IL

*Procurement Finance Intern*

Summer 2025

- Developed commodity pricing models to support \$1B+ in procurement spend, enabling buyers and executives to improve forecasting accuracy and data-driven decision-making
- Utilized advanced Excel functions to enhance pricing files, reducing reporting time by 75%
- Integrated plant data into Power BI, creating reports to support management of a \$530M supply chain budget
- Executed supplier cost and PPV analyses to improve visibility into procurement performance metrics

### Clemson University – CECAS Dean's Office

Clemson, SC

*Post Award Management Student Worker*

Fall 2024 - Present

- Compiled audit-ready reconciliation files, supporting accurate financial tracking and grant compliance
- Reviewed and verified expenditures across procurement systems to ensure accuracy and policy alignment
- Managed and updated 5 fiscal years of financial data in systems, preserving consistency and completeness

### Private Family

La Grange, IL

*Nanny*

Summer 2024

- Coordinated children's schedules and provided transportation to events, ensuring punctuality and safety
- Balanced childcare with household responsibilities (meal prep, cleaning, etc.), maintaining time management

### The Whimsy Cookie Company

Seneca, SC

*Sales Representative*

Fall 2023 - Spring 2024

- Operated cash register, accurately processing transactions while delivering prompt customer service
- Monitored inventory levels and replenished stock to guarantee consistent product availability

## LEADERSHIP & INVOLVEMENT

### Women in Business, *Vice President of Finance*

Fall 2022 - Present

- Oversee \$30,000+ budget and ensure financial compliance for over 600 organization members

### Scholars of Finance

Fall 2024 - Present

### Wall Street South Investment Club

Fall 2025 - Present

### Pi Beta Phi Sorority, *Member Conduct Committee*

Fall 2023 - Spring 2025

- Promoted Pi Beta Phi's values and obligations through 30+ member conduct meetings

### Changing Health, Attitudes, and Actions to Recreate Girls, *Sweat Committee*

Spring 2022 - Spring 2023

- Planned and promoted workouts to encourage healthy habits and community among members

### Student Leadership Education Program

Spring 2022

# AIDAN SAMA

asama0430@gmail.com | (917)-969-3176 | <https://www.linkedin.com/in/aidan-sama/> | 1 Flagler Drive, Greenwich, CT 06830

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## PROFILE

Financial Management student with a strong academic record and hands-on experience in construction management, customer service, and leadership. Passionate about blending analytical skills with project-based roles.

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## EDUCATION

CLEMSON UNIVERSITY- WILBUR O. AND ANN POWERS COLLEGE OF BUSINESS

Clemson, SC

Bachelor of Science in Financial Management

Fall 2022 - May 2026

Minor in Accounting, Emphasis Area: Real Estate

GPA: 3.80/4.0

President's List (Fall 2022, Spring 2023)

Dean's List (Fall 2023, Spring 2024, Fall 2024, Spring 2025)

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## WORK EXPERIENCE

### STARR INSURANCE

New York, NY

#### Finance Intern

Summer 2025

- Collaborated with the Change Management team on the company-wide transition to a new financial system, assisting with system testing, website design, process documentation, and conversations with workstreams leads to ensure a smooth implementation process.
- Worked with a team of interns on a group capstone project performing a simulated risk assessment for a hypothetical client by analyzing financial exposures, operational vulnerabilities, and ensured accurate risk mitigation strategies through conversations with company underwriters.
- Presented group's findings and strategic recommendations to company managers and employees and answered any questions about the processes and results, strengthening communication and presentation skills in a corporate environment.

### ROUND HILL CLUB

Greenwich, CT

#### Golf Caddie

Summer 2024

- Delivered exceptional customer service by assisting members with course navigation, club selection, and game strategies, enhancing their overall experience.
- Developed strong interpersonal and communication skills by building rapport with members and fostering meaningful connections.
- Demonstrated reliability and professionalism by consistently arriving prepared and maintaining focus throughout long, physically demanding days.

### JOHN HUMMEL & ASSOCIATES

New York, NY & Greenwich, CT

#### Custom Home Building Internship

Summer 2023

- Gained valuable hands-on experience in the homebuilding and renovation industry working on a variety of projects ranging from penthouses in Manhattan to luxury homes in suburban Connecticut.
- Attended and documented meetings with project managers, site supervisors, architects, engineers, clients, inspectors and more.
- Ensured clear communication between supervisors and craftsmen through strong communication and organization skills.

### BRUCE PARK SPORTS

Greenwich, CT

#### Sales Associate

2019-2022

- Managed inventory organization by ensuring accurate stock levels, efficient product placement, and timely restocking to help optimize store operations.
  - Assisted in store operations, supporting daily tasks such as inventory audits, order fulfillment, and coordinating with suppliers for stock replenishment.
  - Developed strong communication and problem-solving skills by addressing customer needs, handling inquiries, and resolving issues efficiently.
- 

## SKILLS & INTERESTS

**Skills:** Microsoft Office, Financial Analysis, Independence, Attention to Detail, Project Coordination, Team

**Leadership Interests:** Real Estate Development, Construction Management

## **Jacob Schorsten Sattely**

Simpsonville, SC | (910) 330-5506 | Sattelyj@gmail.com | linkedin.com/in/jacobsattely

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### **PROFESSIONAL SUMMARY**

Clemson University senior in Financial Management (Investment Banking emphasis). Experienced in market research, portfolio analysis, and Bloomberg analytics. Seeking entry-level finance role to apply quantitative and client-focused skills.

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### **EDUCATION**

#### **Clemson University – Clemson, SC**

Bachelor of Science in Financial Management

Minor: Accounting | Emphasis: Banking & Investments | Dec 2025

Dean's List (2023) • Delta Chi Fraternity • Wall Street South Investment Club • Finance Club

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### **EXPERIENCE**

#### **Financial Advisor Intern – Janney Montgomery Scott, Cary, NC | Jul–Aug 2022**

- Supported advisor team by conducting market research and preparing client portfolio analyses, helping inform investment recommendations.
- Leveraged Bloomberg Terminal to gather and interpret real-time financial data, enhancing the accuracy of market insights.
- Assisted in client servicing by coordinating administrative tasks and preparing investment materials, ensuring seamless advisor-client interactions.

#### **Business Operations Intern – Blount Island Command (DOD), Jacksonville, FL | Jun–Jul 2023**

- Analyzed logistics and cost data across multiple contractors, identifying performance trends and delivery inefficiencies.
- Prepared weekly reports on cost valuation, delivery times, and contractor performance for leadership decision-making.
- Developed standardized data tools to streamline reporting and improve the accuracy of analytics

#### **Culinary Specialist – Fuddruckers, Simpsonville, SC | May–Aug 2024**

- Trained staff and maintained quality standards in a high-volume environment.
- 

### **SKILLS**

Excel (Pivot Tables, VLOOKUP) • Bloomberg Terminal • Financial Modeling • Investment Analysis

- Access • Visio

# STEFANO SCHMIEDING

Naples, FL | Open to Relocation | (239) 248-2614 | [stefanocschmieding@gmail.com](mailto:stefanocschmieding@gmail.com) | [LinkedIn](#)

## EDUCATION

**Clemson University** | Clemson, SC

Graduation: May 2026

*Bachelor of Science in Financial Management*

*Minor in Accounting; Emphasis in Real Estate*

**Columbia University – Business School Executive Education**

Completion: September 2025

*AI for Business and Finance Certificate*

## PROFESSIONAL AND ACADEMIC EXPERIENCE

**Arthrex, Inc** | *Strategic Development Intern* | Naples, FL

May 2025 – August 2025

- Led financial model development and comparable transactions evaluation for 3 M&A opportunities totaling over \$500M in near-term value, enabling leadership to advance negotiations
- Conducted competitive landscape analyses across markets, identifying enabling target company prioritization, negotiation of deal terms, and the ability to conduct postmortem reviews against financial targets
- Analyzed competitive brand performance using proprietary data models to summarize areas of inorganic growth in the marketplace and drive further considerations of Arthrex's inorganic strategy
- Delivered a comprehensive landscape review and acquisition recommendation to senior executive stakeholders for a new innovative market, informing Arthrex's ongoing due diligence on the market and specific targets

**Kin Home** | *Sales Development Representative* | Columbus, OH

May 2024 – August 2024

- Applied interpersonal skills in door-to-door solar sales to convert prospects, generating 80+ leads
- Addressed client concerns effectively to boost satisfaction, contributing to an increase in neighborhood conversion rates

**Study Abroad Program** | Rome, Italy

June 2023 – July 2023

- Studied business law and accounting, broadening knowledge of international practices to juxtapose against US law and GAAP

**Carlson, Gaskey & Olds, P.C.** | *Intern* | Birmingham, MI

June 2021 – August 2021

- Streamlined organizational processes by sorting and updating >1,000 legal files, improving office efficiency by reducing search times
- Supported patent due diligence research using internal software tools while demonstrating professionalism and initiative as the youngest member of the team

## LEADERSHIP EXPERIENCE

**Phi Gamma Delta (FIJI)** | *Treasurer* | Clemson, SC

January 2024 - Present

- Managed a \$250,000 annual budget and reconciled monthly financials, ensuring fiscal discipline and transparency
- Oversaw committee chair spending and adherence to financial policies, maintaining accountability across the organization
- Procured University funding via board presentation to support charitable initiatives

**Real Estate Club** | *Member* | Clemson, SC

September 2023 - Present

- Attended weekly meetings with industry professionals, peers and alumni to gain insights into CRE markets, career pathways and investment strategies

## SKILLS & INTERESTS

- *Financial Modeling, Microsoft Office Suite, Market Research, Strategic Analysis, AI Applications, Public Speaking, Piano, Golfing, Basketball, Fishing, Clemson Sports, Detroit Lions*

# Gianna Sciortino

(480) 845-4217 | gianna.sciortino17@gmail.com | [LinkedIn](#)

## EDUCATION

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

*Bachelor of Science in Financial Management; Graduation Date: May 2026*

- **Minor: Accounting**
  - **Emphasis:** Corporate Finance
  - **GPA:** 3.63/4.0
  - **Honors:** Member of Clemson University Honors College, Order of Omega, Dean's Global Leadership Program, Dean's List Fall 2022, Spring 2023, Fall 2023, and Spring 2025
- 

### **Goldman Sachs**

**New York City, NY**

*Investor Relations Summer Analyst*

*June 2025 – August 2025*

- Supported preparation of quarterly earnings materials, including updating investor presentations and analyzing analyst models to anticipate key market questions
- Engaged in daily monitoring of market developments, analyst notes, and shareholder activity to identify trends impacting Goldman Sachs' investment positioning
- Collaborated with cross-functional teams to ensure accuracy and consistency of investor-facing materials

### **Morgan Stanley**

**Anderson, SC**

*Wealth Management Summer Intern*

*June 2024 – July 2024*

- Conducted market research and financial analysis to support tailored investment strategies
- Engaged in strong attention to detail and accuracy in maintaining detailed client records
- Assisted financial advisors with client portfolio analysis while gaining exposure to a wide range of financial products and services

### **Scholars of Finance**

**Clemson, SC**

*VP of Professional Development*

*January 2025 – Present*

- Facilitate communication between finance professionals and SOF leadership team
- Maximize engagement by leading industry introduction presentations for new members
- Organize professional development events, including resume reviews, speaker series, mentorship programs, and interview workshops to support and prepare 40 new members for successful recruitment

### **Leadership Signature Program**

**Clemson, SC**

*Marketing Division and Human Resources Division*

*January 2023 – 2024*

- Executed the holiday networking reception for Clemson Executive Leaders and alumni to showcase the program of 65 students
- Elevated the venue to a more sophisticated space, resulting in an increase in attendance of approximately 30%
- Worked in a team of 5 to launch new social media accounts and enhance the company's website to better market and recruit potential new candidates

## SKILLS, ACTIVITIES & INTERESTS

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**Skills:** Proficient in Excel, JP Morgan Private Banking Job Simulation on Forage, Goldman Sachs Virtual Insight Series, Bloomberg Market Concepts Certificate, Strong Organization, Analytical, Communication, and Time Management skills

**Activities:** Wall Street South, Financial Management Association, Women in Business Club, Trading Room Assistant, Waitress, Honors College Peer Mentor, Zeta Tau Alpha Philanthropy Liaison

**Interests:** Dancing, Skiing, Traveling (15+ countries), Study Abroad Spring 2024, Reading, Hot Yoga





# AUSTON SCOTT

austonscott2@gmail.com | 610-716-4188 | West Chester, PA 19380

## Education

Clemson University | Clemson, SC  
**Bachelor of Science** in Financial Management and Accounting  
Corporate Finance Emphasis

*Expected in 05/2026*  
Cumulative GPA: 3.67/4

- Fall, 2023 – President’s List, Spring and Fall, 2024 – Dean’s List
- Spring, 2025 – Business studies program in Milan

## Summary

Dynamic and results driven leader with a proven record of fostering positive team environments and nourishing success. Recognized for positive attitude, strong interpersonal skills, and the ability to build productive relationships with colleagues and stakeholders. Adept at contributing innovative ideas, supporting team projects, and adapting to diverse work styles. Eager to bring a collaborative spirit and a solutions-focused mindset to bolster organizational success.

## Skills

- Strong customer service and interpersonal skills
- Fundamental skillset in Python
- Ability to work efficiently in a fast-paced environment
- Proficient in Excel data entry, filtering, and implementing basic or advanced formulas

## Experience

Ernst & Young | Seattle, Washington  
**Assurance Intern**  
06/2025 – 08/2025

- Gained hands-on experience with a public and private client enhancing technical knowledge of the integrated audit process.
- Completed testing of controls and conducted interim population tests to help my engagement team reach their Q2 milestone.

Clemson Video | Clemson, South Carolina  
**Broadcast Team**  
08/2024 - Current

- Produced high quality compelling sports content for ESPN ACC televised media.
- Worked closely with production teams, directors, and broadcasters to ensure seamless live airings.

Chipotle Mexican Grill | Glen Mills, Pennsylvania  
**Line Cook**  
05/2024 - 08/2024

- Executed the preparation and presentation of Chipotle's menu items, ensuring consistency and flavor while adhering to company policies.
- Managed multiple tasks simultaneously while remaining organized in a fast-paced environment.

## Activities

- Clemson Finance Club Member
- Program leader of youth community service camp
- High school and collegiate DECA competitor
- Wall Street South Investment Club Member
- Habitat for Humanity volunteer
- Shadowed CFO of local food bank

# BRENDEN SHIPSHOCK

CLEMSON, SC 29631

(803)-743-2535 | BSHIPSH@G.CLEMSON.EDU | <https://www.linkedin.com/in/brenden-ships shock/>

## EDUCATION

### Clemson University // Clemson, SC

Bachelor of Science - Financial Management (Emphasis in Commercial Banking and Investments)	December 2025
Bachelor of Science - Biological Sciences Minor -	December 2025
Political Science	December 2025
Minor - Accounting	December 2025

## AWARDS

- |   |              |
|---|--------------|
| • Clemson University Dean's List              | 2023         |
| • SC LIFE Scholarship Recipient               | 2018-2023    |
| • Eagle Scout                                 | 2018-Present |
| • 2nd Place in the Clemson Biology Merit Exam | 2016         |

## SKILLS AND CERTIFICATIONS

- |                                      |                           |
|--------------------------------------|---------------------------|
| • Non-Profit Organization Operations | • Program Leadership      |
| • Project Management                 | • Equipment Maintenance   |
| • Administrative Leadership          | • Lifeguard Certification |
| • Fundraising Coordination           | • BLS Certification       |
| • Project Oversight                  | • CPR Certification       |

## INVOLVEMENT

### Boy Scouts Of America

*Volunteer // South Carolina* 2008-Present

- Managed fundraising, gathered donations, and recruitment.
- Supported engaging, fun and smooth-running events by helping with organization and planning.
- Volunteered with organizations to help make measurable differences for program recipients.
- Organized and managed events and projects as part of community support services.
- Adhered to organization procedures to maintain safety for program participants and workers.
- Developed a project plan and oversaw its implementation.

### *Lifeguard // South Carolina*

2016-2021

- Monitored safety of guests in and around swimming pools and lakes.
- Learned and maintained proficiency in first responder skills such as First Aid and CPR to offer individuals in distress optimal support.
- Provided valuable swim instruction to youth to build confidence, strength, and skills.

### Clemson University Tiger Band

*Clemson University Drumline // Clemson, SC*

2018-2019

- Practiced and learned material while assisting others in need of help.
- Worked together with other members to execute satisfactory performances.
- Publicly performed in front of tens of thousands.

## Katelyn J. Stabile

East Quogue, NY 11942 | kjstabile1@icloud.com | 631-374-1236 | [www.linkedin.com/in/katelynstabile/](http://www.linkedin.com/in/katelynstabile/)

### EDUCATION

<b>Clemson University, Wilbur O. and Ann Powers College of Business</b>	<b>Clemson, SC</b>
<i>Bachelor of Science in Financial Management</i>	Expected May 2026
<i>Minor: Accounting, Emphasis: Corporate Finance</i>	
Cumulative GPA: 3.75/4.0	

### WORK EXPERIENCE

<b>Netrex Capital Markets</b>	<b>Melville, NY</b>
<i>Summer Analyst - Debt Advisory</i>	June 2025 - July 2025
<ul style="list-style-type: none"><li>Assisted and learned about all aspects of live deal issues: external lending calls, due diligence, facilitated lender service, and deal execution.</li><li>Created detailed Org Books (free deal background) to highlight key decision-makers and enhance client targeting and deal execution for the deal team.</li><li>Oversaw the deal portfolio project management system.</li></ul>	

<b>Elite Tennis by Katelyn</b>	<b>East Quogue, NY</b>
<i>Private Tennis Instructor</i>	Summer 2020 - Summer 2025
<ul style="list-style-type: none"><li>Leveraged my all-state tennis ranking into a lucrative entrepreneurial business.</li><li>Grew my client portfolio by 3x utilizing direct and innovative marketing techniques.</li></ul>	

<b>Clemson University</b>	<b>Clemson, SC</b>
<i>Student Athlete Tutor</i>	August 2024 - Present
<ul style="list-style-type: none"><li>Selected after rigorous screening and received extensive training to tutor elite athletes in business calculus.</li><li>Lead training for new tutors, equipping staff with essential skills and ensuring protocols of Clemson University, the ACC, and the NCAA.</li></ul>	

### CAMPUS INVOLVEMENT

Women in Business, Wall Street South Investment Club, Finance Club	January 2024 - Present
Club Tennis (Travel Team), Central Spirit	August 2022 - Present

### HONORS AND CERTIFICATIONS

<b>Bloomberg Market Concepts Course</b>	June 2025
<b>JPMorgan Chase &amp; Co. Excel Skills Program</b>	July 2024
<b>President's List, Clemson University</b>	Fall 2022, Spring 2023, Fall 2023
<b>Dean's List, Clemson University</b>	Spring 2024, Spring 2025

### SKILLS

**Content:** Finance (Cash Flow Analysis, Asset Valuation, Capital Budgeting), Accounting (Financial Statement Analysis, Ratio Analysis), Problem-Solving and Microsoft Suite (Excel, Word, PowerPoint).  
**Process:** Listening, Communication (Oral and Written), Collaboration, Leadership and Project-Management.  
**Language:** Proficient in Spanish.

### HOBBIES/INTERESTS

Tennis, Pickleball, Golf, Karaoke, and Hiking

# JONATHAN STEIGER

(864)-594-1732 • Jonathanstgr@gmail.com • 323 Tigers Eye Run • Duncan SC 29334

## EDUCATION

### Clemson University

Expected Graduation: December 2025

Bachelor of Science in Financial Management

GPA: 3.38/4.00

- Minor: Accounting & German
- Honors: Dean's List (Fall 2022 & 2023, and Spring 2024)

### Enrolled in Adventis' Financial Modeling Certification (FMC) Program

- Includes the Financial Modeling Course, Valuation Module, and Leveraged Buyout Module

## EXPERIENCE

### WJ Partners – Spartanburg, SC

August 2025 – Present

Private Equity Intern

- Selected for a competitive internship at a lower-middle market private equity firm focused on long-term value creation.
- Support deal sourcing, financial modeling, and due diligence on potential portfolio companies.
- Conducted industry diligence on critical power systems supporting large-scale data centers and emerging AI workloads.

### RecBooks365 – Houston, TX (Remote)

January 2025 – Present

Accounting Intern

- Developed and maintained a dynamic 13-week cash flow model, improving financial forecasting and cash balance management.
- Conducted in-depth P&L analysis to identify financial trends, cost-saving opportunities, and performance drivers.
- Performed detailed balance sheet reconciliations, enhancing data integrity and supporting strategic decision-making.
- Led a gross margin review by analyzing cost of goods sold (COGS) relative to revenue streams, identifying fluctuations in product-level profitability, and recommending actionable strategies to optimize margin performance.

### Anton Häring – Bubsheim, BW, Germany

May 2024 – July 2024

Summer Intern

- Gained comprehensive experience in both the Accounting and Financial departments inside of Anton Häring. Learned the intricacies of accounting practices, including budgeting and bookkeeping.
- Developed a well-rounded perspective on financial operations and management within Anton Häring.
- Attended various meetings with clients and documented key takeaways from new product ideas to solutions to existing problems.

### Chick-Fil-A – Duncan, SC

May 2021 – January 2023

BOH Team Member

- Prepared dishes in a fast-paced environment, working with teammates to maintain a high customer satisfaction rate.
- Helped management stay on top of supply needs by sharing information about low or spoiled inventory.
- Selected to train new employees in various positions in the kitchen, ensuring safety protocols and efficient kitchen operation

## ACTIVITIES

### German Professional Society– Clemson, SC

October 2022 – Present

Treasurer

- Led in organizing and planning the 2024 German and Spanish in International Business and Engineering Conference.
- Attend a Biweekly gathering where German Students and Professors Meet to talk in German.
- Assisted a professor in organizing a job fair at Clemson University, featuring German companies looking to recruit talent.

### Wall Street South Investment Club– Clemson, SC

August 2024 – Present

Club Member

- Wall Street South Investment Club starts with an initial cash balance of \$100,000 to engage in simulated trading.
- Gained experience in managing a diversified portfolio, including stocks, bonds, mutual funds, and options.
- Applied risk management strategies, such as maintaining a maximum of 25% of the portfolio value in a single position and adhering to limits on futures and options allocations.
- Conducted comprehensive market research and analysis to identify potential investment opportunities.
- Achieved top 5 overall performance out of all participants by generating consistent returns through disciplined trading strategies.

### Clemson FinTech– Clemson, SC

Feb 2024 – May 2025

Club Member

- Made connections between club members and FinTech professionals through organized meet-and-greet sessions, enhancing members' professional networks and career prospects.

## AWARDS, LANGUAGES, SKILLS & INTERESTS

**Awards:** South Carolina LIFE Scholarship, Chick-fil-A Remarkable Future Scholarship

**Languages:** Fluent in English & German, with fluent spoken Portuguese and beginner proficiency in reading and writing.

**Skills:** Excel (Advanced), PowerPoint, Python (Beginner – pandas, NumPy, financial modeling), Tableau & Power BI.

**Interests:** Soccer/Bundesliga, Bayern München, Poker, College Football, & Investing/ personal portfolio up 101.23% in 3 Years

# TOMMY STRIBLING

8258 Toll House Rd, Annandale, Virginia

(571)-205-0466 | Testrib@clemson.edu | LinkedIn: Tommy Stribling

## EDUCATION

### Clemson University

*Bachelor of Science in Financial Management*

*Minor: Accounting, Emphasis: Real Estate*

- **Dean's List:** Fall 2022, Spring and Fall 2023, and Spring and Fall 2024

**Clemson, SC**

*May of 2026*

## PROFESSIONAL EXPERIENCE

### Greysteel

*Sales Intern*

- Analyzed and databased properties and shadowed property tours
- Attended training on the aspects of brokerage including underwriting, finding properties, and interpersonal skills
- Completed a mailing list, including stuffing, addressing, and mailing, of over 1000 envelopes

**(Bethesda, MD)**

*June 2025 – August 2025*

### Washington Nationals

*Guest Experience Representative*

- Attended to any fan needs and answered all questions
- Managed a section of seats during the game by checking tickets and enforcing stadium rules

**(Washington DC)**

*June 2025 – August 2025*

### Stanley Martin Homes

*Production Intern*

- Participated in inspections with the country inspector and fire marshal to ensure the homes comply with housing code
- Participated in quality walks to ensure all of Stanley Martins Standards are met and the home is move in ready
- Communicated with contractors to ensure the homes were constructed properly and on time
- Shadowed new homeowner orientations and settlement walks

**(Chantilly, VA)**

*May 2024 – August 2024*

### Army Navy Country Club

*Outside Service*

- Attended to all member needs including handling members golf bags, cleaning and staging golf carts, picking practice balls off the driving range, cleaning practice balls, restocking the driving range, picking the balls off the practice greens, and restocking the practice greens
- Closing golf operations and locking all doors

**Fairfax, VA**

*Fall 2020 - Summer 2023*

## LEADERSHIP & EXTRACURRICULAR EXPERIENCE

### Walk The Farm

*Charity Fundraiser*

- Walk the Farm is a fundraiser I organized to raise money for multiple sclerosis research
- Created a funding raising page on the National MS Society website
- Reached out to the community to find participants
- Set up a course to walk
- Organized volunteers for the event
- This event raised over \$3000 for multiple sclerosis research

**Markham, VA**

*2021*

# JOHN F. STUART, JR.

(973) 828-5432 | [JackStuart27@gmail.com](mailto:JackStuart27@gmail.com) | [www.linkedin.com/in/john-stuartjr](http://www.linkedin.com/in/john-stuartjr)

## EDUCATION

### Clemson University, Powers College of Business

*Bachelor of Science, Financial Management (Corporate Finance Concentration)*

*Bachelor of Science, Accounting*

*Business Management Minor*

May 2026

GPA: 3.58 / 4.00 – Dean's List

Clemson, SC

## WORK EXPERIENCE

### Hudson Bay Capital (UK LLP)

*Summer Analyst - TMT L/S*

June 2025 – August 2025

London, England

- Conducted bottom-up fundamental research on public TMT companies across payments, fintech, and stablecoin subsectors to support long/short investment decisions.
- Integrated Hudson Bay's proprietary company theory and deal code system with financial modeling (DCF, earnings forecasts) to stress-test valuation scenarios and sharpen investment theses.
- Conducted research on a TMT IPO (NYSE: CRCL), providing investment insights that supported fund participation in the offering, which subsequently became a multi-bagger.

### Clemson University Guide Association

*Tour Guide*

October 2023 – Present

Clemson, SC

- Serve as ambassador for Clemson University, showcasing the University to prospective students through 90 minute tours.
- Learn and retain extensive knowledge about the university, to provide tour participants with important information, interesting facts, and answers to all student and parent questions ranging from housing to curriculum and student life.
- Selected out of over 450 total applicants after a rigorous, five-round interview process.

### Boxcar Bar and Grill

*Server*

May 2020 – May 2024

Short Hills, NJ

- Interact tableside with customers using interpersonal, organizational and time management skills.
- Shadow sole proprietor to evaluate operational costs, analyze overhead and increase efficiency.

## LEADERSHIP EXPERIENCE

### South Carolina Experiential Learning Grant

*Out of State Grant Recipient*

April 2025 – August 2025

Clemson, SC

- Awarded the Grant by Clemson University and the State of South Carolina to support a competitive off-campus internship experience based on academic standing, financial status, and internship relevance
- Curated professional deliverables documenting internship outcomes and project progress, aligned with the grants purpose.

### Garrison Clemson Sales Innovation Program

*Member*

January 2024 – Present

Clemson, SC

- Learn key sales concepts regarding business decisions, selling frameworks, and presentation skills.
- Participate in real world, role-play focused sales training with the end goal of providing an edge in the job market.
- Competed in various competitions within the program to sharpen skills in interviews and sales pitches

### Financial Managers Association

*Member*

September 2023 – Present

Clemson, SC

- Plan and attend engaging field trips with other club members, experiencing real-world professional environments, networking opportunities, and industry leaders, fostering a practical understanding of the skills learned in the club.
- Acquire valuable expertise in interview preparation, and gain essential pre-professional knowledge of core financial subjects.

## Certifications/Skills

- Wall Street South Investment Club
- Bloomberg Market Concepts (BMC), Bloomberg Finance Fundamentals (BFF)
- Knowledge in Visible Alpha software and navigation features
- Developing Excel/Tableau acumen
- Novice understanding and comprehension of Python programming language
- Dynamic Financial Modeling and Stock Pitching Experience
- Morgan Stanley - Prime Brokerage Client Intern Day Participant

## INTERESTS

- Avid outdoorsman with a passion for golf, basketball, skiing and fitness
- Clemson and New York sports fan (Giants, Yankees, Knicks, Devils)

# Kelly Tierney

(914)-888-6550 | keltierney11@gmail.com | <https://www.linkedin.com/in/tierney-kelly/>

## Education

**Bachelor of Science in Financial Management** May 2026  
**Minors: Accounting and Mathematical Sciences** GPA: 3.5/4.0  
*Emphasis in Investments and Commercial Banking*  
*Clemson University - Wilbur O. and Ann Powers College of Business* Clemson, SC  
*Clemson University's Dean List* Spring 2023, Fall 2023, Spring 2024, Spring 2025

## Professional Work Experience

**Xylem Finance Leadership Development Program (FLDP)** May 2025 - August 2025  
*Rotation 1: Financial Planning & Analysis* White Plains, NY

- Built June forecast across \$8.6B in business segments, identifying cost-saving levers and trend shifts
- Consolidated and analyzed financial data using Oracle to identify cost drivers and support variance analysis
- Collaborated with senior Finance leaders to shape strategic insights and deliver C-suite financial materials

*Rotation 2: Investor Relations*

- Prepared earnings call materials, investor decks, and SEC-compliant presentations for shareholder meetings
- Leveraged FactSet for market and peer analysis to drive messaging strategy and investor outreach
- Synthesized KPIs and industry trends using Bloomberg to support communications and executive Q&A

## Other Work Experience

**Pretty Skin for Covid-19 & Nurses are Angels** February 2020 - Present  
*Founder* Ardsley, NY

- Founded and scaled a nonprofit initiative that distributed over 40,000 skincare products to healthcare workers across New York, New Jersey, and Connecticut, coordinating donations, logistics, and corporate partnerships

**House of Sports** April 2023-August 2024  
*Camp Director* Ardsley, NY

- Led and implemented structured sports programs for K-8 children, demonstrating leadership and coordination

## Honors and Professional Development

*Leaders of Tomorrow Program at PKF O'Connor Davies - New York, New York* June 2024

- Completed leadership workshop, exploring careers in financial services through firm-led sessions and networking

*Southern Regional Council on Statistics (SRCOS) Undergraduate Research Experience - Waco, Texas* June 2023

- Strengthened analytical and data interpretation skills through applied statistical research and workshops

## Campus Involvement

**Active Member of Clemson University's Investment Banking Club** January 2024 - Present

- Construct DCF, comps, and precedent transaction models for mock M&A pitchbooks; present valuations to peers

**Recruitment Committee for Sigma Kappa - Kappa Pi Chapter** August 2022 - Present

- Executed fall recruitment strategy by managing logistics and communications to attract and engage new members

## Volunteer Experience

**Ronald McDonald House** November 2016 - Present

- Volunteer and assist families with seriously ill children by cooking meals and donating gifts on holidays

**Buddy Leader at the Miracle League of Westchester** September 2016 - Present

- Train volunteers to engage individuals with special needs in recreational activities

## Technical Skills & Certifications

Bloomberg Market Concepts (BMC) - Completed, Securities Industry Essentials (SIE) - FINRA Certified  
SAS - Advanced, R programming - Advanced, Microsoft Excel - Advanced, Microsoft Office Suite - Advanced

# William J. Wachel

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[www.linkedin.com/in/william-wachel-a3161a23b](https://www.linkedin.com/in/william-wachel-a3161a23b)

(713) 906-3717

## Education

**Bachelor of Science in Financial Management**

**Spring 2026**

CLEMSON UNIVERSITY

Minor in Accounting

President's Honor Roll Spring 2023

GPA: 3.78/4.0

## Finance & Investment Experience

**Finance & Accounting Intern at Mansfield Power & Gas**

**June 2025 - August 2025**

- Facilitated all Crude Oil Accounting for two full pay months.
- Found Natural Gas trading discrepancies in final monthly reports.
- Sourced and onboarded a new producer, increasing monthly fee revenue.

**Finance Intern at Wildfire Energy**

**May 2024 - June 2024**

- Conducted research on mergers and acquisitions, asset optimization, and project development
- Assisted in preparing budgets, financial forecasts, and financial models to assess business performance.
- Researched and observed 10+ high-yield bond issuance meetings.

**Trafigura Mentorship Shadow - Houston, TX**

**March 2022**

- Researched California carbon allowance market to identify investment opportunities.
- Contributed to a \$500,000 California carbon allowance trade, resulting in a \$100,000 profit.

## Professional Experience

**Tecovas, Inc. Sales Associate - Houston, TX**

**May 2023 - August 2023**

- Delivered outstanding service, earning a 5-star Google review and \$50,000+ in sales.
- Developed client relationship management (CRM) and sales strategy skills, achieving nationwide top-tier seller recognition.

## Leadership & Extracurricular Activities

**VP of Administration of Beta Theta Pi Fraternity - Clemson, SC**

**Dec 2023 - Dec 2024**

- Led executive meetings and facilitated operational planning for a 100+ member organization.

**Housing Manager of Beta Theta Pi Fraternity - Clemson, SC**

**Dec 2022 - May 2024**

- Managed 29 on-campus fraternity housing leases and organized philanthropy events benefiting children with special needs.

**Financial Management Association - Clemson, SC**

**Fall 2024 - Current**

- Participate in networking and professional development events focused on investment strategies and wealth management.

**Financial Planning Club - Clemson, SC**

**Fall 2024 - Current**

- Engage in discussions on portfolio management, retirement planning, and asset allocation strategies.

**Finance Club - Clemson, SC**

**Fall 2025sa - Current**

- Attended various information sessions to explore and learn more about financial companies

**Wall Street South Investment Club - Clemson, SC**

**Fall 2025- Current**

- Participated in a portfolio simulation contest and attended Bloomberg Terminal training.

## Skills & Certifications

- Financial Analysis & Modeling
- Portfolio & Asset Management
- Excel, Bloomberg Terminal, FactSet



# Justin Walsh

3011 Patrick Road, Schenectady, NY 12303 • (518) 557-9516 • [justinwalsh2004@gmail.com](mailto:justinwalsh2004@gmail.com)

## OBJECTIVE

Enthusiastic and motivated Finance student seeking a challenging full-time job to apply and enhance my business and analytics skills in a dynamic and collaborative work environment.

## EDUCATION

**Clemson University** - Wilbur O. & Ann Powers College of Business  
*Bachelor of Science in Finance, Emphasis in Real Estate, Minor in Accounting*  
Graduation: May 2026  
GPA: 3.23/4.0

**Clemson, SC**  
May 2026

## EXPERIENCE

### MVP HealthCare

**Schenectady, NY**

*Data Analytics & Business Intelligence Intern*

Summer 2025

Supported the Business Intelligence team by developing dashboards, reports, and data models to track and analyze member data. Strengthened my technical skills in Power BI, SQL, and Excel while improving data storytelling and presentation abilities.

- Designed and maintained Power BI dashboards to visualize member trends and key performance metrics
- Wrote and optimized SQL queries to extract, clean, and analyze large datasets
- Used Excel to conduct detailed data analysis and create ad-hoc reports for stakeholders

### Publicis Sapient

**Boston, MA**

*Data Analytics Intern*

Summer 2024

Supported Capacity Planning leadership team with data analytics, dashboards and reporting. Learned corporate etiquette while enhancing my Power BI, Excel, presentation, and communication skills

- Utilized Excel to analyze data and build data visualizations for leaders
- Built and updated Power BI models to support data requests and analysis
- Researched how to leverage AI in analytics and presented results to leadership

## SKILLS

- Microsoft Office with proficiency in Excel
- Power BI
- SQL
- Data Analytics
- Flexible and self-motivated
- Results Oriented

## RELEVANT COURSEWORK

- Financial Management I & II
- Financial Accounting I & II
- Investment Analysis
- Financial Institutions & Markets
- Business Statistics (Intro & Intermediate)
- Management PC Applications
- Principles of Marketing
- Macro Economics

## EXTRACURRICULAR ACTIVITIES

- Treasurer, Delta Chi Fraternity – Manage annual budget and over \$200k of annual receipts and expenditures. Attend national training events and local chapter executive meetings.
- Clemson Community of Undergraduate Business Students
- Soccer, Skiing, Fitness Training, Golf

# Jack Webster

978-831-4924 | jwebst2@clemson.edu | [www.linkedin.com/in/jack--webster](http://www.linkedin.com/in/jack--webster)

## EDUCATION

### Clemson University

May 2026

*Bachelor of Science in Finance and Accounting*

**GPA: 3.92/4.00**

**Honors & Awards:** President's list: Spring 2023, Fall 2023, Spring 2024, Fall 2024 | Dean's List: Fall 2022, Spring 2025

**Activities:** Finance Club, Sales Club, Sales Innovation Program, Scholars of Finance

## WORK EXPERIENCE

### ALKU | Andover, MA

Jun 2025 – Aug 2025

*Sales and Business Analyst Intern*

- Strengthened communication and professional skills through high-volume phone sales and client outreach
- Researched and analyzed emerging markets to identify potential expansion opportunities for the firm
- Reported trends and findings to senior team members, helping guide strategic decisions on market entry
- Participated in team Q&A meetings to learn best practices in sales and specialized staffing solutions

### Concord Recreation | Concord, MA

Jun 2021 – Present

*Head Lifeguard*

- Conducted administrative tasks alongside upper-management to maintain organization for the staff
- Led teams of 4-8 lifeguards, overseeing daily operations such as schedules, swimming skill evaluations, and chemical testing
- Managed the sale of day passes and recorded transactions with a computerized program, excelling in customer service with in person and over the phone interactions

### Greg Carter's European Hockey | Boston, MA

Jun 2020 – Sep 2021

*Coach*

- Collaborated with coaches from elite programs from all over the world in a fast-paced environment
- Interacted with players one-on-one to provide mentorship and feedback based on their individual skill set and personality

## EXTRACURRICULAR ACTIVITIES

### Scholars of Finance | Clemson, SC

Sep 2024 – Present

*Member*

- National organization dedicated to fostering principled leadership in finance
- Participated in workshops and mentorship programs focused on ethics and values-driven decision-making
- Developed skills in leadership, critical thinking, and ethics

### J. Daniel and Nancy Garrison Sales Innovation Program | Clemson, SC

Jan 2024 – Present

*Member and Mentor*

- A highly competitive, application-based program that selects a small, exceptional network of students to grow their professional skills and develop sales expertise through a valuable network with leading sales companies
- Attended several networking events to collaborate with and compete against peers in sales competitions that challenge us to sell products or services or to pitch ourselves for specific roles
- Mentor newly admitted students to the organization providing guidance and insights about the program and skills to help support them through their ascent into a full member

## SKILLS & INTERESTS

**Skills:** French, Microsoft Excel, Python, R, Tableau, Power BI, Bloomberg, MS Office, Bullhorn

**Certifications & Training:** CPR, Data Mining Badge, Working Towards Bloomberg Certification

**Interests:** Pickleball, Skiing, Water Sports, Running, Camping, Lifting, Football

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# LIGHTSEY WELCH

lightseywelch@gmail.com (864) 934-8442 19 Crescent Avenue, Greenville, SC 29605

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## EDUCATION

### Clemson University, College of Business

Bachelors of Science in Financial Management | Accounting Minor | Financial Planning Emphasis  
3.7/4.0 GPA | Expected Graduation: May 2026

## WORK EXPERIENCE

### Ryobi (Anderson, SC)- Techtronic Industries

Summer 2025

#### Commercial Finance Intern

- Analyzed how promotional spend affects our margins to support sales and product teams in driving business strategy.
- Improved data accuracy, efficiency, and visibility by refining recurring Excel processes, then further automating them in Power BI.
- Explored the supply chain, sales, and product sides of the business as they related to the company's financial performance.
- Gain insight into the monthly accounting cycle and reporting process.
- Collaborated with other interns to plan a community service event for the finance team.

### Match Grade Advisors

2023-Present

#### Financial Planning Intern

- Gather data and prepare presentations detailing quarterly portfolio performance for clients.
- Exposure to brokerage firms systems and processes in Charles Schwab, Vanguard, and Fidelity.
- Increased efficiency by automating and implementing a client management system.
- Assist in administrative tasks, data entry, and client communications.
- Observe advisors in curating tax strategy, estate and retirement plans, managing client portfolios, and conveying digestible information to clients.

## LEADERSHIP

### Alpha Delta Pi Executive Board - Vice President of Finance

2024-Present

- Manage the sorority's financial operations, curate an estimated \$500k budget, dues collection, bookkeeping, and financial reporting.
- Prepare monthly financial statements, including bank reconciliation, income statement, common-size balance sheet, etc.
- Coordinate with officers to allocate funds in their budget for various events and initiatives, and assist them in planning and budgeting.
- Enhance members' financial literacy through personal finance and budgeting workshops.

### Alpha Delta Pi Officer - Dance Chair

2023-2024

- Demonstrated my ability to execute a project with passion and precision.
- Choreographed a dance routine with 40 dancers for a Panhellenic event.
- Organized, coordinated, and managed logistics, including practice venue selection, scheduling, and budgeting for costumes.
- Promoted events through social media and other channels.

## HONORS | SKILLS | INVOLVEMENT

- Presidents List, Deans List
- Life & Gollivan-Mills Scholarship
- Women In Business Club
- Proficient in Excel and Power BI
- Financial Analysis, Modeling, Forecasting, and Reporting
- Budgeting
- Tax, Retirement, Estate Planning Principles

# BENJAMIN PATTERSON WHEAT

[Benjaminwheat04@gmail.com](mailto:Benjaminwheat04@gmail.com) | +1 (703) 258-5900 | [linkedin.com/in/ben8wheat](https://www.linkedin.com/in/ben8wheat)

## EDUCATION

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### Bachelor of Science in Financial Management, Clemson University

Clemson, South Carolina

- Minor: Accounting
- Emphasis: Financial Planning
- GPA: 3.13 / 4.00

May 2026

## EXPERIENCE

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### CAPTRUST

May 2025 - August 2025

#### Wealth Management Internship

Greenville, South Carolina

- Assisted in client meetings to achieve financial goals and investment planning.
- Portfolio rebalancing and aligning the client's risk tolerance to investments using Captrust's financial models.
- Hands-on experience using eMoney Advisor software to create financial plans, calculate current success rate, and plan retirement.
- Organized and updated advisor's book of business by updating client meeting records.
- Presented on the implementation of AI in finance to all the office's advisors.

### Society of the Cincinnati

May 2024 - July 2024

#### French Exchange Program

Versailles, France

- Selected to participate in the oldest patriotic society in the U.S. exchange program.
- Participated in events in Paris and Bergerac; immersed in cultural and historical experiences.

### Deerfoot Lodge

May - August 2021, 2022, 2023

#### Camp Counselor

Speculator, New York

- Instructed and guided campers at a Christian all-boys wilderness camp.
- Camped and hiked in the Adirondack mountains, built faith through giving nightly devotionals.
- Instructed 9-14 year olds on how to swim for the first time, helping them conquer their fears of the water and to develop proficiency in different strokes; taught campers how to bass fish and fly fish.
- Responsible for the supervision and safety for 12-14 year olds from the United States, the United Kingdom and Brazil.
- Worked in the kitchen cooking for the entire camp of 350 staff and campers for one month.
- Counselor for the whole summer, as well as the assistant to the section chief for 12-14 and 15-16 year olds for one month each.

### Beta Upsilon Chi

#### Event Chairman

January 2024 - May 2024

- Planned and organized outside functions for fraternity; duties included contacting venues for pricing, availability, and menu options.
- Participated in service projects and fundraisers to help the Clemson community.

## SERVICE, HONORS, INTERESTS

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### Mustard Seed Communities - Caring Homes for Individuals with Disabilities

Montego Bay, Jamaica

- Laid cement for a new patio for residents; built picnic tables.
- Fed and took care of severely handicapped children.

### Lamb Center for the Homeless

Fairfax, Virginia

- Helped prepare meals and wash clothes for the homeless in the community.

### LifePoint Church Kidz Life

Seneca, South Carolina

- Served as a teacher in the kindergarten and first grade classroom.

Finance Club, Financial Planning Club, Swing Dance Club, Film Club

# Zoe Wilcox

zrwilcox13@gmail.com | (214) 914-1832 | [www.linkedin.com/in/zoewilcox](http://www.linkedin.com/in/zoewilcox) | Dallas, TX

## EDUCATION

### Clemson University

*Bachelor of Science, Majors Financial Management and Accounting*

- Emphasis: Corporate Finance
- Clemson University President's List

**December 2025**

*Clemson, SC*

GPA: 3.94/4.00

## WORK EXPERIENCE

### Ernst & Young

*Assurance Intern*

- Analyzed financial statements to identify audit risks and unusual trends.
- Ensured compliance with PCAOB/SEC standards, strengthening capital market integrity.
- Delivered exceptional client service, supporting long-term engagements.

**June 2025 - August 2025**

*Atlanta, GA*

### The Retina Foundation of the Southwest

*Finance Intern*

- Created detailed budgets for grants, ensuring accurate allocation of funds across various research labs
- Maintained accurate accounts utilizing financial software and tools
- Developed strategic plans and forecasted growth models

**July 2024 - August 2024**

*Dallas, TX*

### Ackerman Capital Management

*Wealth Management Intern*

- Assisted integration of Orion trading platform, improving efficiency.
- Created models to evaluate investment strategies and client portfolio performance.
- Rebalanced portfolios to align with evolving risk conditions

**May 2024 - June 2024**

*Dallas, TX*

## LEADERSHIP EXPERIENCE

### Women In Business, Clemson University

*VP of Operations*

- Communicates relevant information to members to increase attendance at meetings
- Facilitates the Mentor Matching Program for 500 members and leads professional development workshops

**April 2024-Present**

*Clemson, SC*

*VP of Finance*

- Manages and develops comprehensive budgets and financial reports for the organization
- Ensures accurate financial records for ~500 members to ensure optimal financial transparency

### Pi Beta Phi Sorority

*External Philanthropy Chair*

- Facilitates community philanthropic involvement for 300+ members, increasing participation
- Organized all major philanthropy events to raise money for the Read>Lead>Achieve

**January 2024-December 2024**

*Clemson, SC*

## SKILLS

**Certifications:** Bloomberg Market Concepts, LinkedIn Excel Skill Assessment, McGraw Hill Excel Advanced Skills

**Languages:** English (fluent), Spanish (basic level knowledge)

**Computer Skills:** Adobe InDesign and Photoshop, Microsoft Excel, Bloomberg Terminal, Power BI, Microsoft Access

## ACTIVITIES

Academic Success Center Accounting Tutor | Beta Alpha Psi - Accounting Honors Society | Investment Banking Club | Finance Club | Wall Street South Investment Club | Clemson Panhellenic Recruitment Counselors | Scholars of Finance

## JACKSON WILKIE

3936 Club Drive, Atlanta, GA 30319

wilkie4@clemson.edu | <https://www.linkedin.com/in/jackson-wilkie/> | mobile: 404-277-9815

### EDUCATION

#### Clemson University

Bachelor of Science in Financial Management

Second Baccalaureate in Marketing

Emphasis: Corporate Finance; Minor: Accounting

Clemson, SC

August 2022 – May 2026

GPA – 3.96/4.00

### PROFESSIONAL EXPERIENCE

#### IPTAY Development and Member Services

Intern

Clemson, SC

August 2023 – Present

- Generated over \$400,000 in revenue for IPTAY through cold calls to alumni.
- Hold calls with donors to maintain a healthy relationship between IPTAY's donors and Clemson Athletics.
- Learning how sell products to hesitant customers.

#### ParkerGale

Summer Intern

Chicago, IL

June 2025 – August 2025

- Created an investment thesis on Athlete Management Software and presented it to the firm.
- Attended board meetings of portfolio companies and met with industry experts such to gain insight into a possible investment space.
- Sourced accomplished executives to potentially lead future ParkerGale portfolio companies.

#### World 50 Group

Summer Intern

Atlanta, GA

July 2024 – August 2024

- Researched leads and learned how to create different sales strategies based on target profiles.
- Won the Intern Capstone Project: Presented a concrete plan to the CEO and leadership team to increase lead generation efficiency and Salesforce processes which has since been implemented.
- Presented the Capstone Project at World 50's November 2024 board of directors meeting.

#### Ocean Air Sports

Summer Intern

Avon, NC

June 2023 – August 2023

- Marketed and sold a variety of products to customers.
- Taught windsurfing lessons to adults and children.
- Learned how to work efficiently with co-workers and develop relationships with customers.

### LEADERSHIP ACTIVITIES

#### IPTAY Student Advisory Board

Social Media/Marketing Committee

Clemson University

April 2024 – Present

- Design and create posts for the IPTAY Collegiate Club social media account.
- Market and promote the IPTAY Collegiate Club to the Clemson student body.

#### Clemson Sailing Club

Treasurer

Clemson University

November 2024 – Present

- Received 27% increase in funding from the Student Funding Board from previous year.
- Monitor and manage finances to ensure appropriate distribution.
- Responsible for over \$100,000 in annual cash flows.

#### Sales Innovation Program

Member

Clemson University

September 2024 – Present

- Highly selective elective program geared towards creating capable sales professionals.
- Compete in interview and sales pitch competitions with fellow members throughout the year.

### ADDITIONAL INFORMATION AND INTERESTS

- Enjoy: dirt bike riding; kitesurfing; English Premier League; golf
- Studied abroad in Perugia, Italy in summer of 2024

# RYAN WOLF

Clemson, SC | P: 864-986-2722 | wolfryan13@outlook.com | linkedin.com/in/ryangwolf

## EDUCATION

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### CLEMSON UNIVERSITY

Clemson, SC

B.S. Financial Management (Emphasis: Commercial Banking and Investments) & B.S. Accounting

May 2026

General Honors and Departmental Honors in Financial Management & Accounting

- Cumulative GPA: 3.99/4.0, Major GPA: 4.0/4.0
- Relevant Coursework: Investment Analysis, Financial Markets and Institutions, Python for Business Analytics, Intermediate Financial Accounting I and II, Analysis of Derivatives, International Finance, Fixed Income

### CLEMSON BUSINESS IN EUROPE: OXFORD PROGRAMME

Oxford, UK

Study Abroad Program with Clemson University faculty at Magdalen College, Oxford University Jul 2023 - Aug 2023

**CERTIFICATIONS:** Chartered Financial Analyst (CFA) Level II Candidate, Securities Industry Essentials (SIE), CFA Institute's Investment Foundations Certificate, Bloomberg Market Concepts, Bloomberg Finance Fundamentals

## WORK EXPERIENCE

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### CLEMSON UNIVERSITY DEPARTMENT OF FINANCE

Clemson, SC

Lead Trading Room Assistant

Aug 2024 - Present

- Support creation and implementation of new curriculum and workshops surrounding the 10+ Bloomberg terminals
- Coordinate support for all terminals, ensuring timely updates and proper use with over 500 users per semester

### SOUTH CAROLINA RETIREMENT SYSTEM INVESTMENT COMMISSION

Columbia, SC

Investment Intern

May 2025 - August 2025

- Contributed to due diligence efforts on prospective investments across private equity, private debt, real assets, and hedge funds for a \$50 billion public pension fund
- Conducted ad-hoc research and analysis on market events or strategic topics to assess potential impacts on the portfolio and make recommendations regarding portfolio exposures to senior investment team members

### CLEMSON UNIVERSITY FINANCE SHARED SERVICES

Clemson, SC

Strategic Finance Intern

May 2024 - Aug 2024

- Reconciled budgets and funds for 10+ groups across the University while creating methods to best display financial information to individuals with limited financial knowledge
- Facilitated the collection of data from and local university Police departments on mutual aid events and utilized this data to develop a system to save 2 hours of payment processing per event with over 300 events per year

## PROJECT AND LEADERSHIP EXPERIENCE

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### CLEMSON UNIVERSITY STUDENT MANAGED INVESTMENT FUND

Clemson, SC

Founder and Senior Portfolio Manager

Aug 2024 - Present

- Spearhead the creation of a student-managed investment fund, designed to give 30+ of the top finance students the opportunity to work together in researching investments and managing a fund
- Steer portfolio construction and strategy to align with an investment mandate of long-term excess returns through decisions on asset allocation, risk exposure, and hedging strategies

### UNIVERSITY OF GEORGIA STOCK PITCH COMPETITION

Athens, GA

Research Team Lead

Sep 2023 - Feb 2024, Sep 2024 - Feb 2025

- Participated for 2 years, directing a team of analysts on picking a stock and conducting a deep dive into the fundamentals of the company using both top-down and bottom-up approaches
- Led team to be 1 of 15 chosen and invited (out of 52 and 109 applicants) to present to industry professionals

## ADDITIONAL INFORMATION

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**Other Involvement:** Financial Management Association (President), Wall Street South Investment Club (Officer), Zeta Psi International Fraternity (Academic Chair), Department of Finance Student Advisory Board, 2025 Point72 National Case Competition

**Technical Skills:** Microsoft Office, Python, Bloomberg, Financial Modeling

# John Madison Wootton

321 Greenway Lane, Richmond, VA 23226 | (804) 801-2077 | jwootto@clemson.edu

## EDUCATION

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

*Bachelor of Science in Financial Management, May 2026*

*Minor: Accounting | Emphasis: Financial Planning*

- 3.75/4.00 GPA within Major
- Study abroad program in Barcelona, Spain

### SIE Exam

- Passed the SIE exam on October 29, 2024

## EXPERIENCE

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**Sterling Capital Management, Charlotte, NC**

*Sales, Client Service, and Marketing Intern, May – August 2025*

- Supported the integration of two firm CRM systems, improving client data alignment amid merger
- Proofread and edited public-facing investment commentary, and created presentations and pitch books for use with private clients
- Aggregated and streamlined strategic asset management data (Top 250 accounts, fee schedules, mutual fund mappings)
- Participated in weekly mentorship sessions with senior leaders, and attended sales team wide mid-year strategy summit

**Camp Rivers Bend, Millboro, VA**

*Senior Counselor and Lifeguard, July – August 2024, 2023; Junior Counselor, June – August 2021*

- Served as Lead Counselor, a special designation, personally responsible for all camp activities during the day, reported to Camp Director
- Oversaw cabin of nine campers, ages 8 to 9, along with two other counselors

**Willow Oaks Country Club, Richmond, VA**

*Golf Shop Attendant, June – July 2023*

- Helped to manage golf activities, assisted members as needed, prepared and closed facilities

**Schutt Capital Management, Richmond, VA**

*Intern, June 2021 – February 2022*

- Conducted research for founder of investment firm, received mentoring and guidance

## EXTRACURRICULAR ACTIVITIES

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**Wall Street South Investment Club, Clemson, SC**

*Member, August 2024 – present*

- Handpick and manage a simulated portfolio of securities and compete against other 173 members of Club
- As Club member, will complete Bloomberg certification course

**Beta Theta Pi, Social Fraternity, Clemson, SC**

*Internal Social Chairman, November 2023 – November 2024*

- Responsible for planning, management of \$40k budget, and execution of five internal events per semester for 150 to 200 attendees, including contracting for venues and live music, and overseeing events
- Help to organize chapter efforts to support the B+ Foundation, which fights childhood cancer

*Fraternity Vice Rush Chairman, November 2022 – November 2023*

- Worked closely with Rush Chairman, developed interpersonal and organizational skills

**Clemson University Clubs: Finance Club, Financial Management Association, and Financial Planning Club**

*Member, August 2024 – present*

- Attend club meetings and events to learn more about financial world and improve networking skills