

## Name

Contact information

## Summary of Qualifications

A bilingual Accounting and Finance major on target to graduate in 2020, I have worked with accountants, attorneys, and financial planners while earning my degree. A recent externship in wealth management particularly resonated because it leverages my analytic approach to problem-solving and my ability to connect with clients to understand their goals, while providing them the tools to achieve them.

## Professional Experience

**XXXXX Bookkeeping** 2018 – now  
**Intern**

- Audit credits & debits, & track day-to-day transactions using Quickbooks
- Generate invoice reporting from Excel

**AXA Advisors NEXT Step** Fall 2018  
**Intern**

- Modeled hypothetical financial plan for high-net worth client & presented to senior management
- Collaborated with team of interns on fundamentals of wealth management

**AP Tax Service, LLC.** Spring 2018  
**Executive Assistant**

- Supported team of accountants with scheduling calendar appointments, tax documents, & managing 40 – 90 Accounts Receivables per week

**Chap Petersen & Associates, PLC** 2017 – 2018  
**Financial Assistant**

- Supported senior partner & associates in law firm with day-to-day administrative tasks
- Improved efficiencies by developing filing system for expenses & receipts

**Celebrity (unnamed)** 2017 - 2017  
**Personal Assistant**

- Managed banking, bookkeeping, & correspondence for NYC-based celebrity
- Taught Google Calendar & Mint apps for schedule management & [budgeting](#)

## Software

MS Office (expert level Word, PowerPoint) ; Drake; Quickbooks; Prezi

## Education

XXXX University (anticipated 2020)  
B.S. – Finance & Accounting