**Anna Jordan**

Address | Phone Number | Email | LinkedIn URL

**EDUCATION**

**West Virginia University,** Morgantown, WV May 2020

*Bachelor of Science in Business Administration* GPA: 3.7/ 4.0

*Major:* Finance

*Minor:* Business Data Analytics

**Study Abroad**: Shanghai University - Shanghai, China May 2019

**TECHNICAL SKILLS & CERTIFICATIONS**

*Development:*Python 3.7 (Proficient), R (Novice), VBA (Novice)

*Applications:*Bloomberg Terminal, Thompson One, Microsoft Office (PowerPoint, Excel)

*CFA Level I Candidate* June 2020 Exam Date

**WORK EXPERIENCE**

**Bank XYZ,** New York, NY May 2019 – August 2019

*Fixed Income Analyst Intern*

* Maintained client portfolios in the analytic system; updated, priced, generated reports, and provided call/maturity information in a timely manner
* Developed data-driven methods of tracking portfolio positions and/or screening for new ideas
* Generated analytic reports utilizing a variety of tools and systems, including CMS BondEdge, Bloomberg, and proprietary tools
* Assisted portfolio managers in tracking and analyzing portfolio-level metrics

**Financial Advising ABC Firm,** Charleston, WV May 2018 – August 2018

*Financial Planning Analyst*

* Performed portfolio analysis on individual client accounts by tracking current holdings via Thompson One
* Designed Excel workbooks of UIT’s nearing maturity date, allowing advisers to provide specific advice upon maturity
* Led a team of 3 interns to develop a client financial plan and made recommendations for the reallocation of current cash holdings, leading to an increase in the client’s net worth

**RELEVANT PROJECTS**

**Student Managed Investment Fund,** West Virginia UniversityAugust 2019 – Present

*Senior Equity Research Analyst*

\*The WVU Student Managed Investment Fund (“SMIF”) is a $400,000 multi-asset endowment fund actively managed by top finance students selected into the SMIF program.

* Produce analysis of companies in the technology, energy, materials and utilities sectors
* Utilize Bloomberg Terminal to analyze the revenue, gross profit, EBITDA, ratios, and growth rates
* Evaluate stock XYZ metrics, compared to top competitors, and assess relative valuations to identify whether the company is a potential investment opportunity
* Utilized results to recommend purchase of XYZ stock, which has outperformed peers by nearly 15%

**LEADERSHIP & ACTIVITIES**

**Alpha Kappa Psi, Beta Rho Chapter,** *President* August 2017 – Present

* Supervise the internal operations of the chapter of 44 members by leading chapter meetings, overseeing and performing performance appraisals on a team of 6 chapter officers, and building a chapter success plan for the long term
* Awarded 1st Degree Bronze Distinguished Service Award for creating a lasting impact on the chatper, region, and fraternity as a whole

**DECA,** *Member* August 2017 – Present

* International Collegiate DECA Case Competition - Financial Analysis, 1st Place March 2019

Include relevant undergraduate projects and craft bullet points about your experience

Include participation in student organizations and highlight any leadership roles