

PROFESSIONAL SUMMARY

Investment professional seeking an equity research role focused on company analysis and markets. Brings a dependable work ethic, attention to detail, and experience collaborating with different teams in deadline-driven environments.

CORE COMPETENCIES

Excel, Morningstar, Bloomberg, portfolio management, problem solving, organization, client service, process improvement, research, and project coordination

PROFESSIONAL EXPERIENCE

Stonegate Wealth Partners | Atlanta, GA

Jul 2023 - Present

- Investment Analyst
- Support portfolio managers and prepare client materials.
 - Research stocks and mutual funds.
 - Monitor markets and rebalance accounts.
 - Prepared client meeting materials and responded to follow-up requests from advisors.
 - Updated market commentary and portfolio information for recurring review meetings.

Stonegate Wealth Partners | Atlanta, GA

May 2022 - Aug 2022

- Investment Intern
- Helped advisors prepare reports and update client accounts.
 - Completed market research projects.
 - Maintained portfolio spreadsheets and updated information before advisor meetings.

RELEVANT PROJECT EXPERIENCE

Payments Equity Initiation Report | Independent

Mar 2026

- Worked with a team to research the company and market, build a basic Excel analysis, and prepare presentation materials.
- Helped complete the financial model and presented the team's recommendation to judges and classmates.

EDUCATION

Georgia State University - J. Mack Robinson College of Business

May 2023

B.B.A. Finance | GPA: 3.76/4.00; CFA Level II Candidate

TRAINING & CREDENTIALS

CFA Level II Candidate. Continuing education in equity valuation, financial-statement analysis, portfolio management, economics, ethics, and fixed income.

LEADERSHIP & ACTIVITIES

Finance Association, CFA studies, community volunteering

SKILLS & ADDITIONAL

Excel, Morningstar, Bloomberg, portfolio management

INTERESTS

Atlanta food culture, tennis, financial literacy, and public-markets writing