

# Toolkit: Finance

## Sample Resume

### LU Rambler

Chicago, IL • [LU.Rambler@luc.edu](mailto:LU.Rambler@luc.edu) • (312) 555-5555 • [www.linkedin.com/lurambler](http://www.linkedin.com/lurambler)

#### PROFILE

Driven, solutions-oriented finance major with proven success in customer service and client communication. Recognized for accuracy, attention to detail and timeliness individual and group projects. Resourceful and analytical with a strong ability to identify themes and patterns.

#### CORE COMPETENCIES & SKILLS

Portfolio Management | Client Presentation and Public Speaking | Project Management | Data Analysis  
Financial Statements and Forecasting | Regulatory Compliance  
Microsoft Office Suite: Excel - Pivot Tables, VLOOKUP, Index/Match | Spanish - Fluent

#### EDUCATION

Loyola University Chicago, Quinlan School of Business Chicago, IL  
Bachelor of Business Administration in Finance Expected May 2022, GPA 3.85

Relevant Coursework: Business Finance, Microeconomics, Business Information Systems, Operations Management, Law and the Regulatory Environment of Business, Macroeconomics, Investments

#### PROFESSIONAL EXPERIENCE

Financial Advising Firm Madrid, Spain  
Analyst Intern June 2019 – Present

- Build financial models to value companies, research and compile market data
- Participate in over 50 client calls to identify key customer service themes
- Prepare correspondence and marketing materials for senior financial analysts
- Assist, organize and schedule internal and external meetings to ensure project deadlines are met

Windy City Cafe Chicago, IL  
Barista May 2016 – May 2018 (seasonal)

- Served an average of 50 customers a day, delivered orders while maintaining strong customer service and quick table turnover to increase business revenue
- Managed daily cash receipts averaging approximately \$1,000 in gratuities, determined appropriate share levels with other staff members and divided gratuities equitably

#### LEADERSHIP & VOLUNTEER EXPERIENCE

Loyola University Chicago Chicago, IL  
Rambler Investment Fund, Team Member October 2018 – Present

- Participate in the portfolio management worth over \$800,000
- Develop equity research reports on stocks to pitch to advisory board
- Present pitch to all fund members with overall analysis and recommendations

#### PROFESSIONAL ASSOCIATIONS

Association for Financial Professionals, Member October 2018 – Present

### Pro Tips

- Best fonts: Ariel, Calibri, Helvetica, Garamond, Georgia
- Your physical address is no longer needed, city and state is sufficient
- Avoid using first person pronouns
- Send as a PDF unless requested in another format saved "Your Name - Resume"
- One page is considered appropriate for 1-10 years of experience



# Toolkit: Finance

## Sample Interview Questions

- Tell me about yourself.
- What makes you a good fit for our company?
- Tell me about a time when you did not meet a deadline. How did you resolve the situation?
- Please share a time when you had to extract information from a database to make a data informed decision. If you do not have experience with any databases, then share in general about your data analysis experience.
- How would you value this example company? Calculate FCF, working capital, enterprise value, etc. Does anything strike you about these financial statements? Please share your analysis.
- What statements do you need in order to value a privately held company?
- Please share about any experience you may have with financial forecasting.
- What do you think has more economic risk: mortgage or credit cards?
- Please share your experience with client relationship management. For example, share a time when you had to clarify client expectations.
- Please share any type of financial statements you have prepared in the past? Which is your favorite type of statement and why?
- How do balance sheets and income statements relate?
- What systems do you use to stay organized?
- Please share a time when you had to make a difficult decision. What was the approach you used to determine the best action plan?
- Please share about a time when you had to resolve an issue with a coworker. How did you resolve it, and were you able to identify the source of conflict?
- Please tell us a time when you were successful with a project management experience. What made you successful in this experience?

## Skills

- Financial Statements
- Negotiation and Closing
- Portfolio Management
- Client Presentation and Public Speaking
- Regulatory Compliance
- Project Management
- Data Analysis and Application
- Database Management
- Ethical Leadership and Stakeholder Management
- Strategic Planning
- Financial Forecasting and Analysis
- Project Management
- Google Analytics
- Microsoft Office Suite: Excel - Pivot Tables, Modeling, VLOOKUP

## Professional Associations and Resources

- Association for Financial Professional
- The American Finance Association
- National Investment Banking Association
- International Association of Investment Bankers
- Bank for International Settlement
- Barchart.com
- Bloomberg
- Chicago Mercantile Exchange
- Commodity Futures Trading Commission
- Financial Management Association
- Dow Jones
- Federal Reserve Bank of Chicago
- Federal Reserve Bank of New York
- Forex Market
- International Monetary Fund
- NASDAQ Stock Exchange
- New York Stock Exchange
- Oanda, the Currency Site
- Philadelphia Stock Exchange
- Security Exchange Commission
- World Bank Group
- Emerging Market Trader Association

