

Full-time MBA candidate with experience in the financial services industry as a benefits consultant and analyst. Strategy-driven manager and mentor with the ability to adapt to changing environments in fast-paced settings.

## EDUCATION

**W. P. Carey School of Business at Arizona State University**, Tempe, AZ 2017 – 2019  
Master of Business Administration – Finance, Global Business Economics

**University of California, San Diego**, La Jolla, CA 2011 – 2013  
Bachelor of Arts, Sociology; Minor, Finance

## PROFESSIONAL QUALIFICATIONS

- Financial Modeling & Valuation
- Risk Management / Analysis
- Contract Negotiations
- Portfolio Engineering
- Optimization / Decision Analysis
- Cross Functional Team Management
- Mergers & Acquisitions
- Predictive Analytics
- Data-Driven Decision Making

## PROFESSIONAL EXPERIENCE

**W. P. Carey School of Business MBA Student Investment Management (SIM) Fund**, Tempe, AZ 2018 – Present  
*Fund Analyst*

- Responsible for security analysis and portfolio engineering of a student-led investment fund worth over \$1 million
- Selected from over 50 applicants to manage funds in fixed income, equity, and REIT securities
- Collaborates with 7 analysts to allocate portfolio investments utilizing value, momentum, and agnostic fundamental strategies

**Honeywell Aerospace**, Tempe, AZ 2018

*Contracts Intern – Mergers & Acquisitions, Integrated Supply Chain, and Government Contracting*

- Performed due diligence by evaluating supplier risks to Honeywell and helped drive a multibillion dollar acquisition decision by working with several stakeholders, including 16 outside advisors and 5 investment banks
- Negotiated with global suppliers to procure SATCOM hardware development for commercial and military aircraft
- Facilitated APU development for armed forces helicopter programs, securing a \$60 billion contract awarded by the U.S. Army

**Marsh & McLennan Agency**, San Diego, CA 2014 – 2017

*Client Manager* (2016 – 2017)

- Led cost-cutting and employee benefits strategies; secured above a 95% client retention rate consistently each year while increasing client base from 20 companies in 2015 to 32 companies in 2016, all in the mid-market sector
- Promoted to Client Manager for leading a 5-person team to manage over \$3 million of employee benefits spend
- Negotiated insurance carrier contracts, saving clients \$1.3 million in 2016 versus negotiated savings of \$850,000 in 2015
- Researched and resolved healthcare claim issues, serving as the relationship manager between insurance carriers and clients

*Analyst* (2014 – 2016)

- Structured benchmarking analysis to drive pricing strategies and keep clients within 90% of their respective industry trends
- Spearheaded process innovation by switching communication materials from mass print to mobile apps and by increasing efficiencies in risk modeling using Excel, driving company costs down by 20% and increasing efficiency by 35%
- Programmed simulations to project healthcare costs and structured benefit plans based on risk probabilities to reduce exposure to segmented industry pools, producing savings of \$100,000 per company per year

**Starbucks Corporation**, Fairfield, CA and San Diego, CA 2007 – 2014

*Supervisor*

- Managed the work of over 60 partners across three stores to execute store operational needs in a fast-paced environment
- Optimized flow times and decreased food waste by 30% through demand planning and inventory management

## ACHIEVEMENTS

- Recipient, Full-time MBA Net Investor Award 2018 – Present
- Education Abroad: China, India, Israel, Japan & Peru (Short-term faculty-led and student-led programs) 2018 – 2019
- Forward Focus MBA Scholar, Arizona State University 2017 – Present
- MBA Student Ambassador, W. P. Carey School of Business Full-time MBA 2017 – Present
- Speaker, Medical Underwriting, Risk Management, and RFP Marketing, Marsh & McLennan Agency 2015 – 2017
- Treasurer & Alumni Advisor, Executive Board, Sigma Nu Fraternity 2012 – Present
- Volunteer & Philanthropy: Boy Scouts of America, Habitat for Humanity, Junior Achievement, YMCA 1999 – Present
- Interests: music, film, playing drums, exotic coffee, craft beer, Bay Area sports, snowboarding, surfing, hiking