

Anna Jordan

Address | Phone Number | Email | LinkedIn URL

EDUCATION

West Virginia University, Morgantown, WV
Bachelor of Science in Business Administration
Major: Finance
Minor: Business Data Analytics

May 2020
GPA: 3.7/ 4.0

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 University

August 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 chapter, region, and fraternity as a whole

DECA, *Member*

August 2017 – Present

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

March 2019

Resume Checklist

Personal Information

- Include your first and last name at the top in a large font (14-16pt).
- Phone Number:** List the number where you are most easily reached; set up a professional voicemail.
- Email Address:** Use a professional address, such as firstname.lastname@gmail.com. Avoid inappropriate prefixes, such as mountaineer.cutie@gmail.com.
- Address:** Different scenarios dictate which address (or addresses) you should include: current, permanent, both, or none. If your address is close to the job location, include it. If the address is far away and you want to include your address, it can be beneficial to indicate that you are mobile or actively relocating since some companies find that they better retain talent who already live in close proximity.
- If you are active on LinkedIn, include the URL to your profile.

Formatting & Appearance

- Make sure your resume is one page.
- Use a readable font such as Calibri, Arial, Times New Roman (11-12pt).
- Differentiate sections by headings (e.g. Education, Work Experience, Involvement, Leadership).
- Put Education as the first heading, then organize headings in order of importance.

Education

- Include West Virginia University at the top of the Education section. Underneath, include Bachelor of Science in Business Administration.
- List Finance as your major and include all minors and areas of emphasis.
- Add any undergraduate projects you have completed and include what you did, how you did it (research methods), and if you presented your findings.
- Add study abroad experience and include 1-2 bullet points about what the experience entailed.
- Include your GPA (always if above a 3.0; if below a 3.0, contact the CCD to discuss)
- Add honors (Dean's List, Scholarships, etc.). You can also create a separate section toward the bottom.

Work Experience, Leadership, Involvement, and Volunteering Sections

- List the name of the organization, the title you held, and the location (city, state).
- Put your start date (month and year) and end date (month and year).
- Bold or italicize job titles and/or the name of the organization.
- List experience in reverse chronological order (most recent first).
- Use bullet points to highlight your responsibilities and tasks.
- Use action verbs (present tense for current jobs, past tense for previous jobs).

Building Better Bullets

- Use quantifiable and measurable information in your bullets.
 - *BAD* Open-ended:** Helped managed children at summer camp
 - *GOOD* Measurable:** Managed over 250 children ages five to fourteen at a week-long day camp
- Ensure your bullet points are objective, rather than subjective or up to personal opinion.
 - *BAD* Subjective:** Experienced verbal communicator
 - *GOOD* Objective:** Delivered ten Ignite-style presentations to audiences ranging from 10-100 individuals on the topics of ethics in the workplace

Technical Skills & Certifications

- Include technical (hard) skills, such as proficiency in various software systems.
- Do not simply list soft skills (e.g. teamwork or leadership). Demonstrate them via the bullet points of your experiences.
- List any certifications and/or exams you intend to sit for. (e.g. Chartered Financial Analyst – CFA Exam)