

JOSEPH CHAVEZ

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EDUCATION

University of Illinois at Chicago, Chicago, IL Expected December 2017
Bachelor of Arts in Economics

- Dean's List
- Related Coursework: Advanced-level Macro/Micro Economics, Investment Management, Financial & Managerial Accounting.

Harper College, Palatine, IL Awarded December 2016
Associate of Arts Degree

- Elected Vice President of the National Honors Society for Business and Social Sciences Students (Kappa Beta Delta).

PROFESSIONAL EXPERIENCE

UBS Wealth Management, Barrington, IL May 2016-Present
Investment Management Intern

- Assist team with analysis of high net-worth investment portfolios totaling \$200 million to meet clients' goals and risk tolerances
- Produce and conduct financial goal analysis presentations for clients, helping add over \$15 million to assets under management
- Monitor major indices and interest rates to develop an intuition for market behaviors and report information to portfolio management team

Smith, & Blake, LTD., Chicago, IL September 2016-February 2017
Accounting Intern

- Evaluated the accuracy of monthly financial statements for over 350 McDonald's franchises across the United States
- Performed high priority time-sensitive projects regarding inventory analysis to assist team in preparing clients for audits
- Excelled in time management and organization demonstrated by handling multiple projects simultaneously

Wealth Capital Management, Boston, MA October 2016
Job Shadow with Portfolio Manager

- Shadowed and observed a portfolio manager at a \$30 billion long/short equity hedge fund manage his \$2 billion portfolio
- Met with sell-side analysts to discuss investments in the industrial sector
- Exposed to the professional utilization of valuation techniques (Trading Multiples, DCF)

L. Wilson Masonry Corporation, Berwyn, IL January 2011- January 2016
Brick laborer and assistant

- Cleared job sites of safety hazards, manufactured mortar, and supplied bricks and materials to bricklayers
- Developed an physical and mental understanding of what it takes to run a successful family business

LEADERSHIP EXPERIENCE

National Honors Society For Business and Social Sciences, Kappa Beta Delta October 2016-May 2017
Elected Vice President

- Preside over club meetings, organize fundraisers, guest speaking events, and networking opportunities for members
- Host workshops focused on teaching students about personal finance

Saint Mary Catholic Church, Berwyn, IL May 2016-Present
Volunteer and Track Coach

- Volunteer for "Meals on Wheels" foundation where I deliver food to elderly shut-ins
- Coached the youth Jr. Olympics Track team, winning a total of 13 medals against 13 other teams

Architectural Solutions Global Expo, Chicago, IL Summer 2010
Architectural Competition

- Ranked 1st in the Midwest design competition for the best residential neighborhood in a Green society

FELLOWSHIP EXPERIENCE

Hispanic American Leadership Council (HALC), Chicago, IL April 2017- Present
Leadership 2030 Fellow

- Selected to participate in an intensive two-year program aimed to advance the professional development and civic engagement skills of the next wave of Hellenic American Leaders
- Meet with political leaders to discuss the future of Hellenic-American relations, including investment, education, and diplomacy

SKILLS

Technical: Microsoft Excel, Word, PowerPoint, Outlook MoneyGuide Pro, Accounting CS AutoCAD, Revit, Rhino
Language: English (Native Proficiency) Spanish (Advanced Proficiency)