

# JAMES SCOTT

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## EDUCATION

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**University of Illinois at Chicago**, Chicago, IL Expected Spring 2018  
*Bachelor of Arts in Financial Economics*

**Harper College**, Palatine, IL Awarded December 2016

*Associate of Arts Degree*

- GPA: 3.37/4.0
- President, National Honors Society for Business and Social Sciences Students (Kappa Beta Delta).

## PROFESSIONAL EXPERIENCE

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**UBS Wealth Management**, Barrington, IL. May 2016-Present

*Investment Management Intern*

- Analyze and manage high net-worth investment portfolios totaling \$200 million to meet clients' goals, risk tolerances, and time horizons
- Helped add over \$15 million of business since July 2016 by producing multiple wealth plan presentations for high net-worth clients
- Becoming familiarized with strategies that address market concerns and creating solutions for clients

**Harris and Harris, LTD.**, Oak Brook, IL. September 2016-February 2017

*Accounting Intern*

- Analyzed and edited the monthly financial statements for over 350 McDonald's franchises across the country
- Data entry tasks that familiarized me with common accounting and bookkeeping software
- Excelled in time management and organization demonstrated by handling multiple projects simultaneously

**Advantage Capital Management**, New York, NY. 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)

**Scott Masonry Corporation**, Addison, IL. January 2011- January 2016

*Brick laborer and assistant*

- Cleared job sites of safety hazards, made mortar, and supplied bricks and materials to bricklayers
- Developed an understanding on what it takes to run a small family business

## LEADERSHIP EXPERIENCE

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**National Honors Society** Kappa Beta Delta 2015- 2017

*Elected Vice President*

- Preside over club meetings with President making sure we operate in a team environment
- Host workshops focused on teaching students about the business industry and preparing their finances
- Organize fundraisers, guest speaking events, and networking opportunities for members

**Saint Demetrios Greek Orthodox Church**, Elmhurst, IL. 2011- 2016

*Volunteer and Track Coach*

- Assist as monthly volunteer for "Meals on Wheels" foundation where deliver food to elderly residents
- Coached kid's Church Jr. Olympics Track team, winning a total of 13 medals against 13 other teams

**Architectural Solutions Global Expo** Chicago, IL March 2015

*Architectural Competition*

- Placed 1<sup>st</sup> in competition against other teams from all over the Midwest to design the best residential neighborhood in a Green society

## SKILLS

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Technical: Microsoft Excel, Word, Outlook | MoneyGuide Pro, Accounting CS | AutoCAD, Revit, Rhino

Language: English (native proficiency) | Greek (Fluent)