



Landon Robertson

Wealth Management Intern

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SUMMARY

Current finance student eager to apply academic experience in wealth management. Engaged in financial projects showcasing strong analytical and problem-solving skills. Hands-on practice through extensive coursework has fortified understanding of financial markets. Collaborative work improved leadership abilities, evidenced by projects with peers. Participation in extracurricular activities demonstrates a commitment to teamwork. Ready to contribute insights into investment strategies and client reviews at FinServe Corp, leveraging skills to benefit overall business goals. Excited for opportunities to network with industry experts during the internship.

EDUCATION

Bachelor's Degree in Finance

University of Illinois Chicago 🎓 GPA: 3.0 📅 2027 📍 Chicago, IL

Coursework: *Financial Markets, Investment Strategies, Data Analysis, Quantitative Methods*

TECHNICAL SKILLS

- **Data Analysis Tools:** Excel, R, Python
- **Financial Software:** Bloomberg, FactSet, Morningstar
- **Project Management Tools:** Trello, Asana, Monday.com
- **Statistical Methods:** Regression Analysis, Probability, Time Series
- **Presentation Tools:** PowerPoint, Prezi, Google Slides
- **Investment Strategies:** Equity, Fixed-Income, Alternative Investments
- **Research Methodologies:** Qualitative Analysis, Quantitative Analysis, Mixed Methods
- **Market Analysis Techniques:** SWOT Analysis, PEST Analysis, Competitive Analysis
- **Marketing Platforms:** HubSpot, Marketo, Hootsuite
- **Team Collaboration Tools:** Slack, Microsoft Teams, Zoom

EXPERIENCE

Financial Analysis Intern

University Project 📅 January 2026 - Present 📍 Chicago, IL

Assisted in developing insights by conducting rigorous market research and data analysis for investment decisions. Collaborated with teams to enhance presentation quality, preparing investment reviews displaying clarity and precision. Engineered innovative marketing campaigns targeting student organizations to promote financial literacy and product awareness.

- Conducted comprehensive market research, bolstering evidence-based strategies tailored for diverse clients.
- Prepared insightful investment reviews, refining understanding of client needs and expectations.
- Created targeted marketing campaigns, successfully attracting attention within academic communities.
- Participated in expert-led workshops, cultivating knowledge about current trends in wealth management.
- Developed capstone financial forecasting project utilizing advanced statistical methods.
- Engaged with industry leaders, creating valuable networking channels for future career opportunities.

Finance Research Assistant

Academic Research 📅 September 2025 - December 2025 📍 Chicago, IL

Contributed significant findings on market performance through meticulous financial data analysis. Supported faculty presentations at academic conferences, enhancing research visibility. Excelled in using financial modeling tools to improve evaluation accuracy for potential investments.

STRENGTHS

- 📊 **Analytical Thinking**
Applied analytical skills during research, yielding effective investment insights and valuations.
- 💬 **Effective Communication**
Presented sophisticated data clearly, enabling better decision-making within academic discussions.
- 👥 **Team Leadership**
Led group projects that enhanced collaboration among members, fostering a supportive environment.
- 💡 **Problem-Solving**
Overcame challenges during investigative projects, proposing data-driven solutions to complex issues.
- 🔄 **Adaptability**
Adjusted strategies quickly based on ongoing class feedback, ensuring alignment with course requirements.

SKILLS

Financial Analysis Market Research
Data Analysis Team Collaboration
Presentation Skills Microsoft Excel
Financial Modeling

LANGUAGES

English Native

MY CAREER



- Financial Analysis Intern at University Project (6 Months)
- Finance Research Assistant at Academic Research (3 Months)
- Investment Strategy Developer at Course Project (4 Months)

- Analyzed intricate financial datasets, lending credibility to research outcomes published for undergraduate audiences.
- Implemented financial models, raising the caliber of investment opportunity evaluations within academic studies.
- Prepared conference materials, facilitating discussion around emerging wealth management strategies.
- Synthesized literature spanning wealth management, informing various reports and project decisions.
- Collaborated within student teams, fostering positive dynamics and honing leadership traits.
- Presented complex data-driven findings, boosting confidence and public speaking skills.

Investment Strategy Developer

Course Project 📅 January 2025 - May 2025 📍 Chicago, IL

Crafted a simulated investment portfolio displaying thorough analyses of historical market performance. Cultivated teamwork skills through collaborative data evaluations with classmates, yielding innovative strategies while navigating challenges.

- Designed investment strategies achieving favorable returns during simulated exercises in class.
- Joined forces with classmates to interpret past market trends, enriching learning experiences together.
- Authored in-depth reports focusing on risk assessment and management practices within investment contexts.
- Solicited peer feedback carefully, contributing to continuous enhancement of collective research outputs.
- Engaged in practical case studies illustrating real-world complexities in wealth management.
- Earned commendations from instructors for creative approaches and precise analyses in all assignments.

LEADERSHIP & AWARDS

- Dean's List, University of Illinois Chicago, 2025
- Outstanding Project Award, Finance Department, 2025

CERTIFICATIONS

- Financial Markets and Investments Certification 📅 2026
- Introduction to Portfolio Management 📅 2026

PROFESSIONAL AFFILIATIONS

- Member, Finance Club, University of Illinois Chicago
- Volunteer, Financial Literacy Program for Students, 2025

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST