

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