

ALEXANDRA (Ally) M. MASTROTA

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8240 Toll House Rd
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OBJECTIVE

Seeking position to challenge and enhance my knowledge in financial planning and grow my personal skillset to strongly contribute to an elite firm.

EDUCATION

Bachelor of Science, Business

Expected May 2018

Major: Finance, CFP® Certification Education track

Virginia Polytechnic Institute and State University (Virginia Tech), Blacksburg, VA

Major GPA: 3.64/4.0

Overall GPA: 3.58/4.0

Dean's List: Spring 2015, Fall 2015, Spring 2016, Fall 2016, Spring 2017

WORK EXPERIENCE

Intern, Egan, Berger & Weiner, LLC

Vienna, VA, May 2017 – August 2017

- Observed the client/advisor relationship by attending and participating in client meetings
- Assisted associate planners with all daily tasks to support the lead advisors, such as processing client files, rebalancing client accounts, and preparing for client meetings
- Input client information and generated comprehensive financial plans using MoneyGuidePro and eMoney
- Scanned client files to Docupace so advisors and staff could access information easily and efficiently

Intern, Ameriprise Financial Services, Inc.

Vienna, VA, June 2016 – August 2016

- Prepared agendas, reports, and meeting planners that were used in client meetings
- Aided in the transition to a new compliant recordkeeping system
- Assisted the investment specialist, paraplanner, associate advisors and advisors
- Learned how to develop portfolio/product recommendations to fit a risk tolerance and time frame

Server, Legal Sea Foods, Tysons Corner

McLean, VA, May 2015 – June 2016

- Used organization multitasking, and teamwork to adapt to change in a fast-paced environment
- Developed strong customer service skills by serving a wide range of guests and personalities
- Gained communication skills that are transferable to a professional setting

COLLEGIATE INVOLVEMENT

Alpha Phi Fraternity, Spring 2015 – present

Director of External Philanthropy, Alpha Phi Fraternity, November 2016 – November 2017

- Communicated with other organizations to coordinate Alpha Phi participation in philanthropy events
- Organized chapter members to attend and participate in philanthropy events
- Completed and submitted Event Planner Forms in a timely manner to the Vice President of Campus Affairs

Financial Planning Association, Spring 2017 – present

The National Society of Collegiate Scholars, Spring 2016 – present

Finance Club, Fall 2016 – Spring 2016

SKILLS

Gallup® StrengthsFinder®: Maximizer, Harmony, Relator, Woo, Positivity

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