

Alex Dansberger

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Permanent Address:
3211 Wheatfield Rd.
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EDUCATION

Virginia Polytechnic Institute and State University (Virginia Tech)

BS in Business

Major: Finance, CFP® Certification Education Track

Overall GPA: 3.45/4.00

Expected Graduation: May 2017

Minor: Spanish

Dean's List: Fall 2014 - Fall 2016

WORK EXPERIENCE

Lincoln Financial Advisors/Sagemark Consulting

Intern

Summer 2016

- Assisted with creation of an Excel document to depict client's current financial position
- Updated client information for meetings
- Consolidated client onboarding process information into one easy-to-understand document
- Helped scan and organize documents in electronic client folders
- Gained experience using CRM software: Omnisource, Redtail, and Lincoln Solutions

George J. Falter Company, Baltimore, MD

Stocker / Delivery Assistant

Summer 2013 – 2015

- Managed grocery section on interim basis during supervising employee vacations
- Adapted easily to working in various areas of warehouse depending on need

Merrill Lynch, Baltimore, MD

Intern

Summer 2012

- Attended lunch-break meetings to learn about investments and advisor responsibilities
- Helped file employee records
- Performed basic investment research using Morningstar

ACTIVITIES

Financial Planning Association, VT Student Chapter, Member

Fall 2015 – Present

Running Club, Member

Spring 2015, 2016 – Present

Intramural Soccer

Fall 2014 – 2016

- Intermediate men's champions

Fall 2014

OTHER

Spanish: Moderate speaking, reading, and writing proficiency

Eagle Scout

March, 2013

- Eagle project required budgeting, planning, and leadership skills
- Spoke in front of approximately one hundred people while fundraising

National Academy of Finance, Westminster H.S., Westminster, MD

Fall 2011 – Spring 2013

- Program for driven young students interested in finance
- One of two students selected to present internship experience to prospective students and parents