

Permanent Address
7684 Swallow Road
Sykesville, MD 21784

Patrick J. Marcinko
(301) 310-1723 | pm1237@vt.edu

University Address
915 University Boulevard, C4
Blacksburg, VA 24061

EDUCATION

Virginia Polytechnic Institute and State University (Virginia Tech)
B.S. Business, Majors: Finance and Accounting, CFP® Certification Education Option
Minor: Leadership and Social Change

Blacksburg, VA
Expected: May 2020
Overall GPA: 3.97/4.00

WORK EXPERIENCE

T. Rowe Price **Baltimore, MD**
U.S. Intermediaries Intern *Jun. 2017 – Aug. 2017*

- Analyzed Morningstar mutual fund data and analysts' reports to identify trends for 31 different mutual funds
- Calculated portfolio average allocation, number of placements, and fund chance of usage for over 1,000 financial advisors' client portfolios
- Assisted in creating a repeatable process in Microsoft Excel for visually displaying financial advisor model data
- Organized 3-year trail data for financial advisor's models with funds and weights through Q2 2017
- Wrote commentary to highlight T. Rowe Price's positioning relative to main competitors for 11 fund strategies
- Analyzed millennial trends with financial advisors and developed a report that was presented to senior executives

MTS Financial, LLC **Sykesville, MD**
Accounting Clerk *Sept. 2015 – Aug. 2016, Dec. 2016 – Jan. 2017*

- Used QuickBooks Enterprise Solutions for accounts receivable/payable entries and reconciled bank accounts
- Assisted with tax preparation set up and data entry using professional tax preparation software called Drake

Merrill Lynch **Baltimore, MD**
Wealth Management Intern *Jun. 2015 – Aug. 2015*

- Analyzed over 50 equities, mutual funds, and ETFs using Morningstar, S&P, and BAML analysts' reports
- Created investor profiles and determined risk tolerance to select appropriate asset allocation
- Developed financial portfolios based on investor profiles and by integrating the investors' goals

PROFESSIONAL DEVELOPMENT

The Invest Like the Street Analyst Program **Blacksburg, VA**
Analyst *Sept. 2017 – Present*

- Competitively selected to participate in a one semester program on the fundamentals of value investing, financial analysis, financial modeling, and equity research

AXA Advisors **Falls Church, VA**
Externship *Sept. 2017 – Present*

- Developed analytical, personal, and sales skills through educational seminars, while gaining hands-on experience through a real-life case study about the financial planning process

Ernst & Young **Washington, DC**
Emerging Leaders Summit *Jun. 21 – 23, 2017*

- Competitively selected as 1 of 270 students from North America, Canada, and Europe to engage in three days of professional, personal, and global awareness development with EY professionals and peers

Vanguard **Charlotte, NC**
Explore Program *Dec. 9, 2016*

- Selected among students from top universities to participate in an early talent identification program to network with Vanguard professionals and engage in team building environments

LEADERSHIP EXPERIENCE

Delta Sigma Pi – Professional Business Fraternity **Jan. 2017 – Present**
Finance Committee Chairman

- Assist the VP-Finance in managing a \$10,000 budget, collecting membership dues, and recording expenses

Pamplin College of Business Ambassadors **Nov. 2016 – Present**
Student Ambassador

- Promote Virginia Tech and the Pamplin College of Business by participating in recruiting and yield events
- Work with administration to serve as a resource for high school seniors in the college application process

SKILLS AND INTERESTS

Skills: Microsoft Office – Proficient; Bloomberg Certification – In Progress

Interests: Motivational Speaking, Baseball, Baltimore Orioles, Virginia Tech Football, Traveling, Shark and Bass Fishing