

Caitlin E. Cook

CFA Level I Candidate

399 Angelica Street, Almond, NY, 14804 | 607.382.7897 | cookce16@bonaventure.edu

EDUCATION

St. Bonaventure University

St. Bonaventure, New York

Bachelor of Business Administration in Finance

August 2016 - May 2019

- **GPA:** 3.75 / 4.0
- Completing a 4-year undergraduate degree program in 3 years

WORK EXPERIENCE

Iroquois Group, Inc.

Allegany, New York

Intern

August 2018 - Present

An Insurance Group Network providing services for 2,250 independent Property and Casualty agencies in 41 states

- Manage, organize and review periodic statements received from various subsidiaries and regional offices

HSBC Bank U.S.A.

Buffalo, New York

Intern- Credit Cards and Unsecured Lending

June 2018 – August 2018

- Generate merchant offer programs for credit card users through direct collaboration with Mastercard and large multinational vendors
- Create Pro Formas to forecast the scope and financial profitability of upcoming product campaigns
- Manage the production and implementation of origination, portfolio, and rewards campaigns

LEADERSHIP EXPERIENCE, VOLUNTEER WORK & ACTIVITIES

Students in Money Management

St. Bonaventure, New York

A student-managed fund responsible for the oversight of a \$500,000 portfolio focused in equity investments

Operations Manager

February 2018 - Present

- Oversee day-to-day class operations including class attendance and class itinerary, manage the club voting process in compliance with fund by-laws, prepare itinerary for and present at semi-annual Board of Directors meetings
- Manage the performance of a stock portfolio composed of 20+ holdings

Head of Human Resources and Fund Communications

April 2017 - August 2018

- Coordinate annual NYC and Chicago networking events, as well as recruit, manage and schedule weekly alumni speaker series guests
- Maintain communication with alumni, School of Business faculty, University Advancement and Board of Directors

Analyst- Financial and Fixed Income Sectors

August 2016 - April 2017

- Research, develop and present pitch when prospective stock shows signs of future profitability for portfolio

Foster Center for Responsible Leadership

St. Bonaventure, New York

A center that strives to educate and inspire leaders in business and society who embrace Catholic Franciscan values

President

August 2017 - Present

- Coordinate educational seminars and present workshops related to leadership, ethics and professional development

BonaResponds Volunteer Organization

St. Bonaventure, New York

Volunteer

August 2016 - Present

- Assist in various projects in the local community such as wheelchair ramp construction, the Warm Snuggly Blanket Project for childhood cancer patients, and a backpack initiative for the homeless and underprivileged children
- Participated in disaster relief in Houston, TX on Hurricane Harvey volunteer trip in March 2018

Women's Club Soccer

September 2016 - May 2018

Division I Women's Soccer

August 2016

COMPUTER SKILLS

Microsoft Excel (intermediate), Microsoft Word, Microsoft PowerPoint, Bloomberg Terminal (BMC certification)