

ENRIQUE D. GONZALEZ

(305) 733-9825 • exg560@miami.edu

EDUCATION

UNIVERSITY OF MIAMI

Bachelor of Business Administration in Finance

GPA: 3.64 Overall **GPA: 3.77** Finance

- National Society of Collegiate Scholars
- Provost's Honor Roll & Deans List (Fall 2016)

Coral Gables, Florida
Expected December 2018

RELEVANT COURSEWORK

Investment Portfolio Management, Investments & Securities, International Finance, Intermediate Finance, Financial Accounting, Calculus, Business Statistics, Operations Management, Intro to Contract Law, Organizational Behavior, Marketing Foundations

EXPERIENCE

MERRILL LYNCH

GLOBAL WEALTH MANAGEMENT ADVISORY INTERN

Miami, Florida
June 2017 - Present

- Conducted analysis of year to date IPO performance by formulating total PC's gained and PC's earned on stock per account to forecast profitability of deals; collaborated with team IA in determining position exposure, evaluating investment products from various wholesalers, and in conducting security research on Bloomberg Terminals
- Assessed client's investment objectives, risk tolerance, time horizon, and liquidity needs during visits with FA to improve asset allocation; constructed portfolio presentations, prepared fund fact sheets for fund proposals, and accessed portfolio summary statements to be presented to clients
- Prevented tax withholdings and blocks on accounts by performing due diligence and periodic data validation of tax, fiduciary, and client documentation to assure compliance with industry regulation
- Processed linkages / merges of accounts, loan referrals, shipments, travel notices, payments, debit card orders, deposits, cross postings; oversaw wire transfers, journal entries, and the status of brokerage accounts

DELTA SIGMA PI PROFESSIONAL BUSINESS FRATERNITY

VICE-PRESIDENT OF ALUMNI RELATIONS

University of Miami
Fall of 2016

- Contacted Alumni and assured their engagement with University chapter members by coordinating and hosting networking events to promote the exchange of the diverse professional career experience within the fraternity
- Composed and distributed our chapter's Newsletter, which recapped recent achievements, goals, announcements, member recognition, and motivational messages

BEDLOFT

SALESMAN / ASSISTANT

Miami, Florida
Summer of 2015

- Catered to custom orders of Bedloft's dormitory products for all 7 residential buildings at University of Miami
- Maximized product application by diagnosing each specific situation in accordance to customer's specifications, resulting in both improved product value, and overall customer satisfaction / advocacy
- Managed inventory, including identifying quantity of product in storage to project future requisitioning while simultaneously ensuring proper product assembly / arrangement methods in order to cut operating costs, foster an efficient sales team, and reduce risks

INTERNATIONAL DATA DEPOSITORY

OFFICE CLERK

Miami, Florida
Summer of 2010 & 2011

- Performed diverse clerical duties; reception, greeting clients, phone, fax, archiving, invoicing, prepping, un-prepping and scanning of documents
- Indexed and performed data entry regarding the specific necessities of each client including loan information, customer profiles, chart number, and service information
- Maintained professional discretion and accuracy to uphold impeccable standards of company reputability and reliability

SKILLS

- Professional proficiency in Spanish
- Proficient in Microsoft Excel, Word, PowerPoint, Outlook