

Kyle Long

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EDUCATION

University of Miami

Coral Gables, FL

Bachelor of Business Administration in Finance

Triple Minor: Business Analytics (Statistics), Accounting, and Business Technology

Expected May 2019

GPA: 3.82/ 4.0; ACT English - 34 ACT Math - 34

Honors/Awards: Bermont Carlin Scholar, UMiami Academic President's Scholarship, President's Honor Roll (2017), Provosts Honor Roll (2016-2017), Dean's List (2015-2017), AP Scholar with Honor, Honorable Mention on College Board's Hispanic Program

Relevant Coursework: Introduction to Alternative Investments, Applications in Corporate Finance, Intermediate Financial Management, Investment and Security Markets, Fundamentals of Finance, Financial and Managerial Accounting, Business Analytics, Calculus I and II, Business Technology and Innovation, Economics, Intro to Programming, Business Law, Statistics

PROFESSIONAL & LEADERSHIP EXPERIENCE

Morgan Stanley

New York, NY

Incoming Wealth Management Summer Analyst

June 2018 – August 2018

Ameriprise Financial Horvath Wealth Management

Miami, FL

Intern

February 2017 – November 2017

- Analyze client portfolios to evaluate performance, alignment of portfolio contents with the client investment goals, retirement needs, income objectives and risk tolerance, and provide assistance in modifying portfolio to re-weight for sector diversification and overall objectives.
- Conduct price analysis on illiquid stock portfolio, including determination of current market price, commission on sale, net value, and net gain, and attempt to identify market for sale of product to maximize client value.
- Communicate with clients regarding general inquiries and portfolio status, assistance with client special needs and coordinate client issues with financial advisor.
- Participated in meetings to evaluate asset allocation and portfolio construction, including review of client equity, bond, REIT and cash reserve selections and suitability of investments for client risk profile
- Interned while taking full course load in the Spring 2017 semester

Fidelity Investments

Boston, MA

Summer Intern

June 2016 - August 2016

- Participated in coordinating, identifying, and documenting in spreadsheet form measurement calculations relating to asset allocation, research and trading, performance analysis, and data
- Researched security software packages for analysis of cloud based system protection, evaluated cost and completeness of available packages, and analyzed cost efficiency of software security options for ultimate recommendation as to package adoption
- Communicated with departmental executive teams as to research findings, analysis of cloud protection options and cost efficiency implications of package adoptions
- Conducted conference calls and meetings with appropriate departments to assist my research
- Participated in learning seminars provided by Fidelity on a variety of asset management topics

SKILLS, ACTIVITIES & INTEREST

Technical Skills: Object Oriented Programming: Python; Microsoft Office: Word, Excel, PowerPoint, Outlook

Activities: Sigma Chi Fraternity active member, Sharon High School Basketball Club Founder and Director, Sharon High School Basketball Player, Sharon Rec Basketball Coach, International Travel to Italy, Spain, England, France, Mexico, and the Bahamas

Interests: Playing and watching basketball, fantasy football, coaching

Dual Citizenship: USA and Spain