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FINANCIAL SERVICES ANALYST / ASSOCIATE MERGERS & ACQUISITIONS / SECURITIES & INVESTMENTS RESEARCH & COMPLIANCE / ORGANIZATIONAL ROE, ROI & ROA

"Jon is not just a recent finance graduate ... he has that 'it' for making his mark in tough times ... I expect big things from this guy ... watch for him ... he'll navigate the way."

~ Gary Abrams, Ph.D., Dean of Finance, Carlson School of Management, University of Minnesota

ASSETS

CURRENT ASSETS

Long-time finance "junkie" with a passion for exploring financial puzzles and change. Leverage analytics, academic knowledge, technical savvy, business experience and influencer talents to deliver optimal holistic solutions. Devour and apply financial media and event insights to real world finance and business.

FIXED ASSETS

BACHELOR OF SCIENCE, FINANCE – UNIVERSITY OF MINNESOTA, Minneapolis, MN (December 2008)

Innovative curriculum, an immersion core, capstone / global experiences and state-of-the-art facilities / technology (new in 2007) distinguish the Carlson School of Management as one of the premier undergraduate programs in the nation.

\$ **SOLID FINANCE CORE.** Embraced "tough" non-mandatory major classes: Financial Derivatives, Business Statistics and Corporate Finance. Studied at Hong Kong University of Science and Technology (Summer 2008).

\$ **INDUSTRY READINESS.** Financial intermediaries; financial management or investment organizations; corporate finance; international finance; and government regulatory, administrative or service roles.

\$ **REAL-WORLD PROJECTS.** Tackled analytics, research and problem-solving around real-world scenarios. Produced extensive data-driven documentation to complement research and findings.

- **Dissertation.** Co-authored *A Comparative Analysis Report between Buffalo Wild Wings and Applebee's*, a study of contributing factors to companies' financial performance and future predictors.
- **Target Corporation Analysis Review.** Produced an examination of Target Corporation's history, current financial ratio, debt management, asset management, profitability, market value and competitive presence.
- **Economics.** Wrote report on life insurance through an asset-focused economic lens, published in 3/2009.
- **Business Consulting.** Led project team in consultation with area businesses to diagnose and analyze cost-effectiveness and rates of return on contemplated commercial real estate transaction.

\$ **MINNESOTA INSURANCE LICENSURE.** Attained Life, Accident and Health Insurance licensure.

\$ **ENGINEERING.** Completed college-level Engineering Calculus, Math and Physics coursework. Participated in American Society of Mechanical Engineers chapter activities.

INTANGIBLE ASSETS

\$ **PERFORMANCE & ETHICS.** Balanced full academic load with work (30-60 hours/week; same employer 5+ years); 3.8+ GPA; actively participated in campus organizational activities. Earned >75% of overall expenses.

- **President's Student Leadership & Service Award.** One of seven graduating seniors honored with prestigious awarded to one-half of one percent of the student body (diversity and urban business focus).
- **Investment Club.** Served in team effort to learn about investments, manage a portfolio of stocks, tour financial facilities and network with financial experts to learn more about the profession.
- **Student in Free Enterprise.** Earned 3rd Place in national competition blending entrepreneurship, business ethics and finance service launch, New Orleans, 2007.

LIABILITIES

DIVIDENDS PAYABLE

Academic and real-world experience payable to employer.

EQUITY

RETAINED EARNINGS

LANDON LANDFILL, St. Paul, MN

3/2002 to 5/2007; 8/2008 to Present

Manager

Hired while in high school as 1 of 15 to work summers debagging 70 tons/week of city yard waste bags. Promoted as a landfill laborer and then to Manager; reported to owners.

- Took the lead on multiple projects. Directed teams of 2-16. Organized and delegated workflow.
- Served as key contact with hundreds of external customers; resolved quality and customer issues.
- Advised owners on buyout and insurance plans that yielded a 22.3% ROI.
- Chaired the joint Labor/Management Safety Committee.
- Introduced quality improvement and cost reduction projects.
 - Established a scrap reduction program, slashing \$10K a year in costs.
 - Introduced company's first recycling program; moved green while creating a new profit center (\$22K).

TARGET CORPORATION, White Bear Lake, MN

5/2008 to 8/2008

Store Operations Intern & Assistant Manager

Proactively pursued and was hired for multifaceted role honing operations, team and project leadership skills.

- Learned the operations side of the business with a multimillion-dollar store: culture, brand, merchandising, security, team leadership, inventory, financials, sales, shipping/receiving and guest services.
- Analyzed store financials to maximize profits. Made profit margin recommendations to corporate executives.
- Grew revenues by 14% while slashing 15% in overhead costs.
- Conceived of and led special project to revamp the back-to-school set:
 - Marked and zoned clearance products to expedite sales and prepare for new products.
 - Coached team on setup, sales and service; organized new system to service 2,000 guests a day. Project was photographed, reviewed **and adopted by Target's corporate for use in all stores.**

WESTERN SHARED FINANCIAL NETWORK, St. Paul, MN

6/2007 to 5/2008

Financial Representative Intern

Recruited after a meticulous screening process (400+ applicants and four hires).

- Managed all aspects of entrepreneurial-based practice, supported by a network of financial and business training. Embraced the business of helping people build their futures.
- Helped clients manage financial risk and achieve financial security, capital accumulation, asset distribution and estate preservation with insurance and investment products offered through carefully selected partners.
- Approached prospective clients via phone and through extensive networking. Researched scenarios and portfolios, developed strategic action plans and coached clients through them.
 - Recognized as Top 4% of new hires nationwide to earn *Force of Ten* award (written life policies).

PRO FORMA STATEMENTS:

REFERENCES, LETTERS OF RECOMMENDATION & PORTFOLIO PROVIDED ON REQUEST.

When Jon contacted me at the beginning of 2009, he was scared and frustrated. Having invested a great deal of brainpower and sweat equity into achieving a Bachelor's in Finance (the first in his family to go to college), he had accomplished a great deal. However, he graduated at the end of 2008 in what seemed to be a whirlwind of not only economic downturn; but an environment of general distaste for the business of finance.

He was also concerned that he did not have enough relevant business experience. His existing resume was bare bones; it read like job descriptions and did not brand him at all. I knew that in this market and given his entry-level status, we had to make him stand out; and he deserved to! I decided this would be a two-pager to allow for a financial-themed format design to quite simply, be harder to forget when read by hiring managers and recruiters. To convey confidence, his focus was clear, without a tired "me-centered" objective. He had a gem of a testimonial from the Dean of Finance with one of the top business schools in the country. I positioned this next, to "rub in" the fact that he was a star and not just a new grad to be taken lightly!

360 assessments and Jon's own soul searching have repeatedly brought to light his "addiction" to all things finance. We worked hard on branding, and the Current Assets paragraph is the result. The first page goes on to showcase "assets" encompassing non-work experiences, projects, credentials, curriculum, activities and honors.

Page two shifts to the Liabilities and Equity portions of selling Jon. The lion's share of the Equity section, "Retained Earnings," focuses on work. Normally, I would not have taken up as much space with this for a new grad. But it is part of Jon's value. He worked for a local landfill from the age of 15. What's important is how progressive his accountability was, the difference he made (took them green; saved thousands of dollars), the fact that he worked up to 60 hours while in school, and the fact that he was asked back etc. While working for Target, he came up with ideas that were adopted for all the stores! As a Financial Representative, he earned honors almost immediately. He also had to basically work as an entrepreneur, with responsibility for financing his own "business".

Jon first used the résumé at a metropolitan career fair. At the fair, one recruiter sent him a follow-up email saying he couldn't forget Jon. And he included the name of an HR representative for the Finance Department at one of his client companies! Jon "worked" his search, supplementing the resume with business cards, a strong online presence and very proactive networking. In March 2009, his resume was forwarded by a networking contact to a recruiter hiring for Associate of Mergers & Acquisitions with a Fortune 25 innovative leader in the health and wellness industry (serving 55+ million). Jon was hired—full time with great benefits! Times are hard; but persistently conveying value still yields success!