

## Elle Sworth

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### Education

State University of New York at Brockport – Brockport, NY May 2021  
Bachelor of Science in Business Administration, AACSB GPA: 3.2

Monroe Community College – Rochester, NY May 2019  
Associate of Science in Business Administration GPA: 3.6

### Related Experience

**Merrill Lynch, The Brown Group** – Rochester, NY Aug. 2020 – May 2021  
Assistant to Certified Financial Manager (Internship)

- Prepared asset location models of client's current holdings to develop income, balanced, and growth portfolios as desired by the client to inform their future financial decisions
- Created spreadsheets using Excel to compare different retirement plans to ensure their decision was informed
- Participated in conference calls with mutual fund families to perform research on funds
- Tracked mutual fund progress, supplied comparative analysis/research for competitive mutual fund selection

**TRS Heating & A/C** – South Buffalo, NY Oct. 2017 – Aug. 2020  
Installer, Trainer, Assistant

- Practiced just-in-time ordering techniques to minimize excess inventory and improve the company's bottom line by 15% overall
- Trained new employees to manage in-house operations and set up company routines and procedures
- Reviewed client contracts and answered questions to create a positive relationship with clients and show transparency about services
- Performed monthly inventory cycle counts for 10 major product lines to inform buying decisions

### Skills

Sage Intacct, Morningstar Principia Software, and FIS Wealth and Retirement

### Collegiate Activities

Finance Club, *Vice President* Jan. 2020 – May 2020