

Philemon Ogalo

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EDUCATION

Rutgers University, Rutgers Business School, Newark NJ

May 2020

Bachelor of Science in Finance

RELEVANT COURSEWORK & CERTIFICATES

Coursework: Introduction to Blockchain, Financial Econometrics, Security Analysis, Honors Spanish for Business

Certificates: Passed the FINRA administered Securities Industries Exams

WORK EXPERIENCE

CLIENT RELATIONSHIP ASSOCIATE, **Vanguard**, Malvern, PA

2020

- Utilize interpersonal skills to assist clients with a wide range of inquiries necessary to fulfill their needs
- Provide world-class client experiences via phone call to improve investment acumen
- Work diligently with a team and tend to the daily queue of clients with investment objectives for their perspective accounts

DATA ANALYTICS INTERN, **KPMG**

06/2019-09/2019

- Completed modules in data quality assessments, data insight, and data presentation to improve practical analytic skills
- Simplified raw data into an understandable format with Tableau and Microsoft PowerPoint to compare with KPMG models
- Display effective graphs that target high-value customers based on customer demographics and attributes

FINANCIAL SERVICES INTERN, **The Port Authority of New York & New Jersey**, Jersey City, NJ 10/2018-08/2020

- Assisted lead financial analysts with research regarding the Federal Transit Administration grants and capital expenditures for a Hurricane Sandy rebuilding project which was completed 43% earlier than the expected timeframe
- Supported the preparation and documentation for Federal Transit Administration Sandy Grant Reporting
- Utilized Excel and SAP to allocate grants and reimbursements for Federal Transit Administration

BANK TELLER, **Wells Fargo**, Freehold, NJ

06/2018-09/2018

- Managed thousands of accounting transactions and reconciliation tasks for customers in a high-intensity environment
- Ensured 100% customer satisfaction while simultaneously processing monetary transactions
- Adhered to strict deposit box operations and guidelines

LEADERSHIP & COMMUNITY OUTREACH

NCAA STUDENT-ATHLETE, Rutgers Varsity Men's Soccer Team, Newark, NJ

2016-2017

- Dedicate 20+ hours weekly and work collaboratively in a team environment to succeed and advanced to NCAA Elite-8
- Utilize leadership characteristics to help team accomplish their most successful season in program history

ASSOCIATIONS

Rutgers Finance Society

2018-2020

Association of Latino Professionals in Finance and Accounting

2018- 2020

East Brunswick Varsity Soccer Player (Team Captain)

2015-2016

SKILLS & AWARDS

Skills: Microsoft Office (Excel, PowerPoint, Word), Data analysis, SQL, Process Improvement, Tableau, Spanish

Awards: Dean's List, Recognition from Rutgers Business School's Associate Dean for strong academic-standing, Charles M. King Consistency Award, Don Metz Memorial Leadership Award