
Taylor S. Sorgatz

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Education

University of Michigan-Dearborn

Major: **BBA Finance**

Cumulative GPA: 3.66

Expected Graduation Date: April 2017

Relevant Course Work

- Financial Accounting
- Managerial Accounting
- Corporate Finance
- Advanced Corporate Finance
- Business Economics
- Microeconomics
- Macroeconomics
- Project Management

Professional Experience

Merrill Lynch

Seasonal Client Associate

8/2015-Present

- Schedule client meetings and maintain client data and goals.
- Prepare reports for client meetings.
- Complete a monthly portfolio analysis.
- Work with teammates to ensure our group meets all Merrill Lynch requirements.
- Complete asset analysis and tracking of accounts.

Merrill Lynch

Wealth Management Intern

5/2015-8/2015

- Completed basic training in technical chart analysis, portfolio development and stock market analysis through internship program.
- Implemented a client document organization system.
- Compiled all account and asset details for over 100 clients using excel.
- Improved and implemented a new client data organization process.

University of Michigan-Dearborn Department of Accounting and Finance

Student Assistant

11/2013-Present

- Compile data from exams to create reports for professors in the department.
- Create and maintain department reports through excel.
- Compile data from student evaluations using SPSS.
- Provide support to 30 faculty members on special projects needed for courses.
- Respond to emails and telephone inquiries.

Leadership Experience

- *President* - Delta Phi Epsilon Sorority. 4/2015-Current
- *Director of Finance* - Delta Phi Epsilon Sorority. 4/2014-4/2015

Additional Skills

- Proficient in Microsoft Excel, Microsoft Word, and Microsoft PowerPoint.
 - Experience with Statistical Package for the Social Sciences (SPSS).
 - Experience with Microsoft Project.
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