

Daniel A. Vega

EDUCATION:

University of California, Berkeley, CA

Bachelor of Science, Political Economy

Expected Graduation Date: Fall 2010

- Financing 100% of overall college expenses through part-time employment, grants and scholarships

Harvard Business School

Summer Venture in Management Program

- Studied challenges business leaders face, the many dimensions of the business world, and the impact businessmen can have on their community through business leadership using the case method.
- Discussed cases in study groups then presented arguments to professors and other selected participants

EXPERIENCE:

- Jun'07-Present **Merrill Lynch** **San Francisco, CA**
Private Wealth Intern
- Created pitch books and asset allocation portfolios that were presented to potential clients detailing possible financial scenarios
 - Produced quarterly and monthly customized reports, trading summary detailing transactions and addressed client related issues
 - Researched financial products using Bloomberg and company software to aid financial advisor advise clients on financial strategies and possible investments
 - Analyzed office budget and expenses and addressed unrelated charges to office, coordinated and executed management projects involving administrative and technology upgrades
- Sep'06-Aug'08 **Student Achievement Guided by Experience (SAGE)** **Berkeley, CA**
Outreach Mentor Coordinator
- Coordinated and implemented mentoring program with a local high school to increase minority representation at UC Berkeley and Advanced Placement courses at high school
 - Implemented guidelines for successful mentoring relationship to provide academic and personal support, and financial literacy component to assist students with financials
- Jun'06-Aug'06 **PricewaterhouseCoopers** **Los Angeles, CA**
INROADS Intern- Human Resource Advisory
- Conducted surveys of tax associates to aid campus recruiting in delegating recruiting assignments in specific universities and fields
 - Collaborated in a team of six to create a client proposal using firm resources which was presented to a group of partners pertaining to the client
 - Created reports that broke down hourly budgets to assist partners in compensation distribution
- May'06-Jun'06 **Goldman Sachs Undergraduate Camp** **New York City, NY**
Selected Participant
- Participated in an Initial Public Offering case-study of Ralph Lauren Polo where possible benefits were discussed, financial statements analyzed, and placed initial offering market price
 - Traded and sold two simulation stocks according to financial data available and research

LEADERSHIP & ACTIVITIES:

- Jan'08-Present **Wall Street Wizards** **San Francisco, CA**
- Teach students basic financial literacy skills, discuss market events and particular stocks
 - Advise students on portfolio related transactions, track performance of student-managed portfolio
- May'06-Jan'07 **Latino Business Student Association (LBSA)** **Berkeley, CA**
Co-Chair of Marketing Committee
- Coordinated events to recruit new members through organizing activities, interacting with students, and discussing LBSA benefits through presentations

SKILLS AND AWARDS:

- Lockheed Martin 2008-2009, ALPFA 2006-2007 Scholarship, Recipient of The Achievement Award Program (TAAP) scholarship for four years, 2005 Alumni Leadership Award, LBSA Scholarship
- Fluent in Spanish