

Jeff Kaplan

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Home Address: 9648 N.W. 67th Place. Parkland, FL 33076

EDUCATION

Florida State University

Bachelor of Science in Finance

Minor in Entrepreneurship

GPA: 3.51

Finance GPA:3.75

Expected Graduation: May 2016

JOB EXPERIENCE

National Securities Corporation

Wealth Management Intern

Summer 2015

Miami, FL

- Researched individual stocks, trading strategies, investment products, and financial derivatives to assist branch staff in soliciting potential clients
- Constructed a mock equity portfolio returning \$6,000 on initial investment of \$25,000 over three months, outperforming the S&P500 by 35%
- Pitched select stocks including Vingo (VRNG), Zynga (ZNGA), Disney (DIS), and GoPro (GPRO) to branch vice president
- Identified potential wealth management clients through targeted prospecting, cold-calling, and networking
- Delivered a final presentation, and pitched material on GoPro to entire branch office at the conclusion of internship

State Farm

Sales & Marketing Intern

Summer 2014

Cooper City, FL

- Facilitated transactions between new and existing clients of State Farm across all business lines including: Auto, Health, Life, Property & Casualty, and Loans
- Acquired business through marketing and soliciting for Renter's Insurance in the area
- Lead risk assessments for properties covered in the National Flood Insurance Program (NFIP)
- Gained valuable knowledge on the insurance industry and customer service

Moda

Server and Bartender

Sept 2014- Sept 2015

Tallahassee, FL

- Serve high profile clientele including Florida State and Florida Government officials
- Participate in strategies and events to promote Moda, a restaurant/lounge which opened September 2014
- Ensure customer satisfaction and develop relationships with my clients, managers, staff

ACHIEVEMENTS / ACTIVITIES

- Dean's List, Fall 2012, Spring 2013, Spring 2015, Fall 2015
- Start-Up Experience, Fall 2014- Present
- Seminole Investment Club Member, 2013-Present
- (CEO) Collegiate Entrepreneur Organization Member, 2013- Present
- FSU Club Volleyball starter, Fall 2012 – Fall 2015
- Brother in Pi Kappa Alpha Fraternity, Fall 2012- Present
- Scholarship Chair in Pi Kappa Alpha Fraternity, Spring 2013
- Member at Large in Pi Kappa Alpha Fraternity, Spring 2015- Spring 2016
- Florida Bright Futures Scholarship, Fall 2012- Spring 2016

RELEVANT COURSEWORK

- Finance – Financial Markets, Management of the Firm, Commercial Banks, Problems in Financial Management, Investments, Multinational Finance
- Computers – Microsoft Excel, Web Design, HTML, CSS, Word Press
- Entrepreneurship- New Venture Creation, Funding Sources, Innovation
- Accounting – Managerial, Financial, Cost
- Math – Calculus for Business, Quantitative Methods of Business Statistics