Lukas Roberts

Planning Analyst Intern

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STRENGTHS

Adaptability
Successfully adjusted strategies based on evolving client needs and regulatory changes. Proactivity led to enhanced service delivery.

Analytical Thinking
Consistently applied rigorous analytical approaches to evaluate client accounts, uncovering valuable insights and recommendations.

Client Focus
Prioritized clients' unique situations while working closely with financial advisors, resulting in bespoke financial solutions.

Effective Communication
Demonstrated strong verbal and written communication skills in report writing and presentations, fostering trust with clients.

Team Collaboration
Worked within cross-functional teams effectively, forging connections with peers and seniors to enhance problem-solving capabilities.

SKILLS

Asset Management

Financial Analysis

Microsoft Office Suite | Tax Strategy

Client Communication

Compliance Review | Research

Estate Planning

Portfolio Optimization

Presentation Skills | Data Analysis

Market Research

Cash Flow Management

Communication Skills

Problem Solving | Attention to Detail

SUMMARY

Dedicated and detail-oriented financial services professional with over two years of hands-on experience in asset management and tax strategies. Experience collaborating directly with Financial Advisors to support effective client communications and deliver tailored financial solutions. Proven ability to manage multiple tasks efficiently while maintaining high-quality standards. Skilled in Microsoft Office, ensuring accurate documentation and compliance with industry regulations. Eager to leverage analytical skills within a dynamic environment that emphasizes collaboration and impact. Looking forward to enhancing existing processes while assisting clients in achieving their financial goals.

EDUCATION

Bachelor's Degree in Business Administration

University of Michigan | GPA: 3.6 | 2026 | Ann Arbor, MI

Coursework: *Asset Management, Financial Analysis, Tax Strategy, Client Communication*

TECHNICAL SKILLS

- **Microsoft Office:** Excel, PowerPoint, Word
- **Data Analysis Tools:** STATA, R, Python
- **Communication Tools:** Slack, Outlook, Zoom
- **Financial Planning Software:** Morgan Stanley, Goldman Sachs platform, Fidelity
- **Research Methodologies:** Qualitative, Quantitative, Mixed-methods
- **Customer Relationship Management:** Salesforce, Zoho CRM, Monday.com
- **Project Management Tools:** Trello, Asana, JIRA
- **Presentations Tools:** Canva, Prezi, Google Slides
- **Regulatory Compliance:** SEC regulations, FINRA guidelines, AML policies
- **Investment Analysis:** Bloomberg Terminal, FactSet, Morningstar

EXPERIENCE

Financial Analyst Intern

Wealth Management Solutions | June 2025 - Present | Grand Rapids, MI

Assist financial advisors in analyzing portfolios, creating customized investment strategies, and supporting client presentations through detailed reports and insights.

- Collaborated with financial advisors on client portfolio analysis, ensuring strategic alignment with client objectives.
- Conducted detailed cash flow analyses to optimize asset management practices.
- Facilitated the preparation of compelling client presentations that highlight investment opportunities.
- Engaged in continuous learning and supported various operational initiatives for improved efficiency.

Financial Services Intern

Capital Financial Group | January 2025 - May 2025 | Lansing, MI

Supported financial planning operations through market research, documentation review, and training assistance aimed fostering compliance and effectiveness.

- Provided valuable input in market research, enhancing understanding of current financial trends.
- Reviewed client documents to guarantee accuracy and adherence to compliance regulations.
- Assisted in obtaining FINRA Securities Licenses through participative training sessions.
- Acted as a reliable point of contact between senior staff and new associates, sharing knowledge and best practices.

LANGUAGES

English — Native

Spanish — Proficient

MY CAREER

- Financial Analyst Intern at Wealth Management Solutions (1 Years)
- Financial Services Intern at Capital Financial Group (4 Months)

Planning Analyst Intern

Financial Innovations Group | September 2026 - Present | Remote

Focus on client communications and liaise between financial advisors and product providers, maximizing service delivery and compliance checkpoints.

- Managed effective communication channels between financial advisors and external product providers.
- Contributed to estate planning and tax planning assessments by collating necessary data and conducting preliminary analyses.
- Supported quality control during business reviews to ensure compliance is met and maintained across documentation.
- Enhanced team interaction by implementing streamlined communication protocols, benefiting overall productivity.

LEADERSHIP & AWARDS

- Dean's List, University of Michigan. Recognized for achieving academic excellence.
- Internship Excellence Award at Wealth Management Solutions, acknowledged for substantial contributions to team projects.

CERTIFICATIONS

- Property & Casualty License | 2026
- FINRA Securities License (in progress) | 2026

PROFESSIONAL AFFILIATIONS

- Member, Finance Club at University of Michigan. Engaging in networking and skill development activities.
- Volunteer, Local Community Financial Literacy Program. Educating individuals on personal finance fundamentals.

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST