

Nicholas Schwartz

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Education

MICHIGAN TECHNOLOGICAL UNIVERSITY

Bachelor of Science in Finance, Minor in Economics. Department GPA: 3.78

Relevant Coursework: Applied Portfolio Management Program

Houghton, MI
Spring 2024

Experience

MORTENSON

Financial Planning & Analysis Intern

Minneapolis, MN
May – August 2023

- Supported Mortenson's Non-Construction businesses. Primarily BLUvera, Equipment, and Mortenson's Innovation Group
- Designed Power BI pages to visualize, organize, and format data
- Updated and maintained existing Power BI dashboards to ensure data was up to date and to modify these dashboards to the user's needs
- Assisted in the creation and review of monthly forecasts and budgets for Mortenson's Non-Construction businesses
- Created an Excel analysis to determine the relationship between quantity and margin for Mortenson's Wind Equipment Group

SUPERIOR NATIONAL BANK

Compliance Banking Co-op Assistant

Hancock, MI
September 2022 – April 2023

- Reviewed customer beneficial ownership information to ensure it was up to date and to understand account identity
- Updated Superior National Bank's RDC and ACH account privileges to set appropriate risk levels
- Calculated monthly cash activity to be used in a yearly money laundering risk assessment

Retail Lending Co-op Assistant

September 2021 – April 2022

- Provided clerical support to Superior National Bank's Retail Lending department
- Funded and audited consumer loans
 - Worked on a lengthy catch-up project, that involved auditing a year's worth of consumer loans
 - Collaborated with coworkers to fix errors found in loans

TRAVEL TAGS

Account Management Intern

Inver Grove Heights, MN
September 2022 – April 2023

- Assisted the Account Management department with the management, shipping, and scheduling of jobs.
- Held accountability for the Account Management of Travel Tag's luggage tag account
 - Managed Luggage Tag jobs from the moment the customer placed the order to the moment the job was shipped out
- Utilized Power Bi to review the relationship between actual revenues/costs and estimated revenues/costs
- Completed a revenue recognition project within Microsoft Excel, analyzing Travel Tag's revenue per customer

Leadership & Activities

GOLF CLUB

Secretary

Houghton, MI
September 2022 – Present

- Coordinated a weekend-long trip to a club golf tournament. Communicated trip details along with other golf club news to club members

Skills & Interests

Technical: Microsoft Excel, Microsoft 365 Office, Power BI, DAX, SQL

Language: German, Moderate Fluency

Interests: Minnesota & Upper Peninsula History, College Basketball, Running, Economics, Soccer, Travelling