

Keegan Erva

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OBJECTIVE

Current student working towards a BS in Finance seeking a position in the financial industry that provides personal advancement and networking opportunities.

EDUCATION

Michigan Technological University | Houghton, MI

BS Finance | Economics Minor, Financial Technology Minor | GPA: 3.35

Expected April 2023

INTERNSHIP and WORK EXPERIENCE

Superior National Bank and Trust | Hancock, MI

Investment Associate

July 2022 – Present

- Formalized role of the Trust Co-op position
- Assist the Investment Officer

Trust Co-op

May 2021 – July 2022

- Update monthly reports, returns, and model portfolios
- Review investment securities, asset allocations, and account objectives
- Support Trust staff in completing research, preparing for client meetings
- Develop analytical tools for departmental and customer use

Credit Co-op

March 2021 – July 2022

- Review the history of customer financial data and complete annual credit reviews
- Analyze customer risk and determine risk grades
- Execute monthly collateral evaluations and assist with data integrity projects
- Support the Credit department by organizing required data to complete underwriting packages
- Providing customers with forgiveness updates during PPP
- Assist the collection manager with required follow up of delinquent customers

Retail Lending Co-op

June 2019 – March 2021

- Fund and audit consumer loans
- Verify mortgage uploads
- Verify secondary market funding and purchase advices
- Provide customer service to customers while staffing the customer service desk
- Understand and follow the bank/department regulations, policies, and procedures, and participate in all compliance-related training

Snyder's Pharmacy | Negaunee, MI

Stock clerk

April 2017 – April 2019

- Assist with the management of inventory
- Provide customer service

PROJECT EXPERIENCE

Michigan Tech Applied Portfolio Management Program

May 2022 – April 2023

Project: Endowment Investment Fund - Portfolio Manager

- Create an investment management firm and implement an investment philosophy and strategy
- Access financial reports and use cutting-edge investment software

Michigan Tech Team Dynamics - Omega House

January 2021 – April 2021

Project: Gap Analysis and Solution Implementation

- Established a connection with the client and identified gaps within their business
- Conducted problem-solving techniques and implement various solutions to close gaps

MDOT and AASHTO Engineering Bridge Building Competition- (team of 3)

September 2018 – May 2019

Project: Designed, tested, and presented a bridge made from balsa wood (Deck Arch Truss Bridge)

- Researched different prototypes and examples to make a design
- Built prototypes and tested them before the competitions
- Designed a presentation to present in front of a panel of judges

TECHNICAL SKILLS

- Excel
- Power Point
- Word
- Banking software
- Problem solving
- Financial planning
- Analytical ability
- Customer service
- Strong communication