



Kristy Lee O'Malley

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Objective To contribute strong analytical skills and experience to your firm in a fiduciary capacity

Profile

- Reliable, honest, punctual team player who thrives in advanced teamwork situations; played key role on team of undergraduate finance students who bested teams from graduate and undergraduate programs at 85 colleges and universities to win 2008 national championship in RISE (Redefining Investment Strategy Education) Symposium in fixed-income category.
- Challenge-seeker who is eager to learn; sitting for Series 7 exam July 2008.
- Solid communicator who can convey messages to diverse audiences.
- Focused performer who never loses sight of the big picture.

Education

- **Bachelor of Business Administration in Finance, University of La Verne, La Verne, CA, May 2008; Minors in Spanish and Management Information Systems; GPA: 3.2**
 - ◆ Graduated with Honors
 - ◆ Earned University of La Verne Merit Scholarship, Marybelle Windom Award, and Muffy DeVinter Memorial Scholarship for academic excellence in University of La Verne's School of Business.
 - ◆ Accumulated 140 community-service hours.
 - ◆ Served as Chairperson of Standards Board for Greek organization and contributed as event coordinator for university events.
 - ◆ Earned All Conference All-Academic Team honors as walk-on member of University of La Verne University Golf Team, 2006-2007.

Experience

Operations Assistant, JD Asset Management, La Verne, CA, Jan. 2006 to April 2008

- Updated hedge-fund portfolio after completion of daily equity transactions.
- Assisted in training new interns.
- Demonstrated proficiency in MS Excel; utilized with SAS, and Bridge.

Trustee for Sawyer-Duncan Investments Program, University of La Verne University, La Verne, CA, Jan. 2006 to May 2008

- Served as one of four student trustees, which entailed:
 - ◆ Voting on portfolio management decisions derived from student presentations/recommendations.
 - ◆ Conducting extensive research and calculating investment evaluations.
 - ◆ Presenting investment recommendations in formal setting.
- Contributed to team that placed first nationwide in fixed-income category in 2008 RISE Symposium.

Sawyer-Duncan Investments Program Lab Assistant, University of La Verne University, La Verne, CA, Sept. 2005 to April 2006

- Assisted students with financial research services, such as Baseline, Bloomberg, and Morningstar.

Data Entry Processor, HSBC Mortgage Corp, Claremont, CA, May to July 2004

- Prepared residential equity loans for loan officers, which entailed:
 - ◆ Handling incoming mail, assembling loan packages; inputting data from appraisals, credit reports, good faith estimates, and income documents into main system; communicating with HSBC-affiliated brokers requesting loan documents and confirming loan specifications; writing commitment letters, including terms and conditions of loans, as well as archiving loans.

Systems Assistant, Mt. Baldy School, La Verne, CA, July 2003

- Installed a database in new system for multi-media department.