Thoan Z. Freckleton

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EDUCATION

The University of North Carolina at Charlotte   **Charlotte, NC**
Bachelor of Science in Business Administration, Finance   May, 2022
- Honors/Activities: Beta Alpha Psi & National Association of Black Accounts
- GPA: 3.71/4.0
- Relevant Coursework: Financial Accounting, Financial Theory & Practice, Investments, Managerial Economics
- Technical Skills: Microsoft Excel, PowerPoint, Word, Access

PROFESSIONAL EXPERIENCE

Bank of America Private Bank   **Charlotte, NC**
Incoming Investment Management Junior Summer Analyst   *Summer 2021*

University of North Carolina at Charlotte – Housing and Residence Life   **Charlotte, NC**
Desk Assistant (Loan Key) – Belk Hall   *August 2019 - Present*
- Provide client services to over 100 residential students in their assigned community as a front facing representative
- Solve problems for the department through opportunistic analysis to enrich Housing and Residence Life

Bank of America Private Bank   **Charlotte, NC**
Wealth Management Summer Analyst   *June 2020 – August 2020*
- Strengthened enterprise and business functions through line of business (LOB) projects
- Rotated through relationship management, trusts & wealth structuring/strategies, and investment management tracks
- Researched databases for ESG project and offered suggestions to increase advancement of the Hispanic Community
- Created research project on next-generation client retention and engagement, developed solutions, and presented to LOB leaders
- Constructed and collaborated a financial literacy program for next generation client education with other interns
- Leveraged Microsoft Excel and other productivity software efficiently to complete projects with attention to detail

State Farm   **Charlotte, NC**
Summer Marketing Associate   *May 2019 – July 2019*
- Utilized Salesforce in facilitating the establishment of customers and updating opportunities
- Performed 7,200 calls, increasing customer engagement by 17%, and fulfilled 40 quote sheets, contributing a 3% increase sales

LEADERSHIP & ACTIVITIES

BLK Capital Management, Corp   **Cambridge, MA**
Equity Research Analyst   *February 2021 - Present*
100% black student run long/short equity hedge fund that promotes financial education of talented black students around the nation through active money management
- Engage in an analyst education program that includes qualitative analysis, accounting, company/industry analysis, revenue project models, equity research, stock pitches, and DCF valuation
- Pitch a stock in front of investment professionals at the end of a rigorous, six-month introductory investing education program

Business Honors Program   **Charlotte, NC**
Executive Board – Internal Vice President Team   *August 2020 - Present*
The University's premier business school program for 120 academically and professionally excelling students
- Co-instructed a course session on the financial markets, investments, and personal finance
- Guide and advise 2 students in their professional and personal development as they progress through their first year in college

Sponsors for Equal Opportunity (SEO)   **New York, NY**
SEO Participant <Asset Management/Hedge Fund>   *April 2020 - Present*
- Receive 50+ hours of coaching and online instruction to achieve targeted interviews, technical, and professional development goals
- Complete industry-specific training and assessments focused on developing technical skills and institutional knowledge

Student Activity Fees Commission   **Charlotte, NC**
At-large member, Appointed by UNC Charlotte Chancellor   *August 2019 – May 2020*
- Directed the allocation of over $1.5 million in Student Fees to 4 core divisions of the University meant to support students

SKILLS AND INTERESTS

Technical Training: Learning python, CFA Foundations Candidate   **Achievements:** Performed in the 2016 NYC Macy's Thanksgiving Day Parade

Volunteering: Promising Pages, Cardz for Kidz   **Books read:** Applied Equity Analysis, 5 Rules to Successful Stock Investing