

Blake Redd

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<https://www.linkedin.com/in/blake-redd>

EDUCATION

C. T. Bauer College of Business, University of Houston, Houston, Texas

Bachelor of Business Administration in Finance, Personal Financial Planning

December 2024

GPA: 3.80

ACADEMIC PROJECTS

University of Houston, BUSI 3302: Connecting Bauer to Business

Spring 2023

Junior Achievement Financial Literacy Project

- Collaborated with a team of 7 to craft lesson plans for high school students
- Research topics to assess most valuable personal finance topics for young adults
- Assisted in delegating tasks to other group members and facilitated communication between the group and company representatives to provide timely status updates

EXPERIENCE

Bleakley Financial Group, Houston, Texas

January 2024 - Present

Intern

- Maintain Practifi CRM accuracy for over 150 clients
- Prepare client review materials for meetings using Orion and eMoney
- Assist in client onboarding processes on Charles Schwab platform
- Establish systems for training future new hires

TELUS International AI, Murphy, Texas

December 2021 - Present

Evaluator

- Analyze and organize data for use in supervised training models
- Research topics to clean and validate data for training models
- Assist with photo-to-photo generative AI supervised training

Golden Redd & Company LLC, Dallas, Texas

May 2023 - August 2023

Summer Intern

- Maintain client payroll and other records in QuickBooks
- Created an Excel sheet to calculate monthly sales tax for clients
- Entered bookkeeping for clients and devised new Excel sheets for orderly records
- Organized and updated over 500 client folders

CBD Pros USA, Wylie, Texas

October 2020 - August 2021

Sales Associate

- Managed and handled up to \$4500 in cash and credit card payments daily
- Built and maintained long-term relationships with retail guests
- Educated and up-sold products to guests to maintain average transaction of \$70+
- Assisted with marketing campaigns, visuals, purchase orders and re-stocked products

City Line Chick-fil-A, Richardson, Texas

November 2018 - October 2020

Certified Trainer (September 2019 - October 2020)

- Trained 2-3 new employees a month on procedures and store policies
- Aided management with guest complaints, catering orders, and balancing cash drawers
- Delegated tasks to a team of 8 or more members and assessed team member strengths at different positions

Team Member (November 2018 - September 2019)

HONORS AND AWARDS

Dean's List: Fall 2021, Spring 2022

RELEVANT COURSEWORK

Financial Planning for Professionals, Retirement and Estate Planning, Investment Management, Federal Income Tax-Individual