

Luke Banister

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Professional Summary

Finance graduate with experience in portfolio analysis, client relationships, and investment strategy. Managed and presented research on a \$2.5M student-run fund while delivering insights to senior stakeholders. Former NCAA Division I athlete recognized for discipline and leadership, with a proven record of driving membership growth and providing client-focused service. Motivated to build a career in financial advising by helping clients achieve long-term financial security.

Skills

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| • Portfolio & Financial Analysis | • Investment Research |
| • Communication | • Sales & Membership Growth |
| • Customer Service | • Compliance & Accuracy |
| • Client Relationship Management | • Eagerness to Learn |
| • Leadership | • Microsoft Office & R (basic proficiency) |

Relevant Experience

Customer Experience Associate/Youth Training Director - D-Bat Austin

December 2022 - December 2024

- Helped membership sales exceed goals (83% in 2023 to 112% in 2024)
- Supported member accounts, scheduling, and accurate recordkeeping for 300+ athletes.
- Trained athletes while ensuring scheduling and administrative records remained organized.

Real Estate Renovation Project Assistant - Diamond Properties LLC.

June 2018 - August 2022

- Assisted in managing \$3M+ of properties, supporting budgets, schedules, and contractor coordination.
- Maintained records, invoices, and project documentation.
- Coordinated with multiple vendors and contractors.

Retail Operations & Fulfillment Associate - Kohl's

November 2022 - January 2023

- Processed transactions and assisted customers on the sales floor during peak season.
- Fulfilled 25% of 2,000+ weekly online orders.
- Supported back-end and front-end operations in a high-volume retail environment.

Education

Bachelor of Business Administration in Finance

Anderson School of Business at the University of New Mexico – Albuquerque, NM 2023 - 2025

- UNM Baseball Team, 2-year NCAA Division 1 Athlete
- Dean's List 4 semesters, MW Conference Scholar-Athlete, National Society of Leadership and Success (NSLS) Nominee

Associate of Arts in Business Administration

Cleveland Community College, Shelby, NC 2022 – 2023

Temple College, Temple, TX 2021 – 2022

Blinn College, Brenham, TX 2020–2021

High School Diploma

Hutto High School, Hutto, TX Graduated 2020

- Varsity Baseball Captain, AP Academic Scholar Award

Additional Experience & Leadership

Student Investment Fund Portfolio Analyst

January 2025 – May 2025

- Analyzed and calculated financial data for a \$5.5M portfolio
- Collaborated in team settings to present recommendations
- Gained experience with data entry, research, and reporting

Baseball Team Captain - High school & college

2019 - 2020, 2023

- Led teams at both college and high school levels
- Built consensus between coaches and players
- Drove cross-functional communication and performance