

University of Wisconsin-Madison

Madison, WI

Degree: Bachelor of Business Administration

May 2026

Major: Finance, Investment & Banking

GPA: 3.69/4.00

Involvement: Wealth Management Group, Capital Management Club, Badger Roundnet (President)

FINRA Securities Industry Essentials (SIE) Exam

Passed March 2025

FINRA Series 65 Exam

Scheduled October 2025

Professional Experience

Paradigm Advisors

Dallas, TX

Wealth Management Intern

September 2025 – Present

- Maintained client financial documents within **Wealthbox CRM**, ensuring accuracy & confidentiality
- Supported advisor workflows through preparing client records and improving operational efficiency
- Gained exposure to financial planning by managing inputs and client data through **eMoney**

EcoWash Pressure Washing

Wisconsin & Minnesota

Regional Manager

September 2024 – Present

- Calculated and optimized voluntary contributions to **reduce the company’s unemployment tax rate**, resulting in cost savings and improved financial management
- Led **top-performing regional team in company history**, aiding 7 Division Managers to generate **\$440,000 in summer revenue** and contribute to the company surpassing **\$1 million in sales** for the first time
- Generated **financial forecasting tools**, keeping staff on track to meet personal & company revenue goals
- Directed company **expansion into high-growth markets**, establishing a presence in Minnesota
- Implemented comprehensive **training programs** for Division Managers, focusing on advanced sales techniques, marketing strategies, and client management to ensure consistent quality across operations

Division Manager

April 2024 – August 2024

- Directly sold & managed production of over **\$100,000 in revenue** during a five-month period which resulted in breaking the previous summer’s **all-time sales record** by expanding the company to the Green Bay market
- Managed large-scale projects, estimating and overseeing pressure washing and maintenance contracts up to **\$7,000 for 98 clients**, ensuring timely completion and high customer satisfaction
- Developed data-driven marketing approach, resulting in a **51% lead conversion rate** and **52% closing rate**
- Designed & implemented strategic marketing strategy **sourcing over 350 leads**, including breaking **all-time opening leads record** with 121 leads in just two days through targeted home-to-home marketing strategies
- Enhanced operational efficiency by overseeing all facets of production processes, customer relations, sales forecasting, and quality control, resulting in improved service delivery and client satisfaction
- Supervised, recruited, and trained a high-performing team of **five employees**, implementing effective training programs that increased productivity, ultimately driving revenue growth & increased profitability

Garcia Athletics & Sports LLC (DBA Wisconsin Roundnet)

Green Bay, WI

Owner & Founder

July 2023 – March 2025 (seasonal)

- Organized & executed roundnet events attracting over **300 participants from six states**, driving profitability
- Secured national sponsorships, **boosting revenue by \$6,000** through targeted marketing initiatives and partnership development, enhancing brand visibility and outreach
- Managed all financial operations**, including budgeting and forecasting, while streamlining accounting functions to optimize cash flow and costs, promoting sustainable growth and overall financial health

Professional Development

Independent Financial Planning Projects

Green Bay, WI

Advisor

November 2024 - Present

- Advised family member on **self-employed retirement contributions** & planning after a significant income increase to minimize taxes and create a sustainable **long-term financial plan**
- Consulted small business owner on investment allocation and cash flow management to **sustain rapid business growth** while maximizing personal retirement plan
- Educated peers on foundational personal finance topics, including responsibly building credit, maximizing savings, and minimizing debt, to **empower financial literacy** within the younger generation

Wealth Management Group

Madison, WI

Program Lead

September 2023 - Present

- Launching peer-led program to teach underclassmen fundamentals of budgeting, investing, & personal finance
- Completing estate plan **case studies** on tax-efficient wealth transfer strategies for varying scales of wealth