

Zane Rosenbaum

Athens, GA 30601 | znr99770@uga.edu | (912) 506-7743 | [linkedin.com/in/zanerosenbaum/](https://www.linkedin.com/in/zanerosenbaum/)

EDUCATION

University of Georgia

B.S.F.C.S in Family Housing and Consumer Economics, Financial Planning

Intended Grad Date: May 2025

Minor in General Business (*Terry College of Business*)

Overall GPA: 3.92/4.00

Fall 2022 & Spring 2023 UGA President's List

FINRA Securities Industry Essentials (SIE) Certification

Issued 7/19/2024

FINANCIAL EXPERIENCE

Wealth Management VEA Summer Analyst

Alpharetta, GA

Morgan Stanley

June 2024-August 2024

- Collaborate with Morgan Stanley's planning and digital VEA members to assist financial advisors in creating case study financial plans and developing digital marketing strategies
- Learn to navigate Morgan Stanley's modern wealth management tools with the primary goal of increasing client engagement
- Collaborate with other interns and full-time analysts to prepare and study for the SIE Exam

CAMPUS & COMMUNITY INVOLVEMENT

Co-President, UGA Student Financial Planning Association

April 2024-Present

- Facilitate on-campus meetings for 30-50 SFPA members, providing a platform for UGA students to connect with financial services firms through bi-weekly presentations
- Organize and host networking events, resume-building workshops, and alumni/FPA panel discussions
- Coordinate and present at the annual UGA FP banquet held by the UGA financial planning department

Vice President, UGA Student Financial Planning Association

April 2023-April 2024

- Served as the first point of contact for students within the club, in addition to assisting the president in outreach to 8 financial services firms
- Created marketing brochures and emails, and delivered elevator pitches during lectures for upcoming SFPA events

Other Campus Clubs/Organizations: Athens Student Investors Club (ASIC), UGA Bodybuilding Club, IM Soccer

VOLUNTEERING

Volunteer Committee, UGA Financial Literacy/Well-Being Week

February 2024-April 2024

- Guided UGA students on personal finance topics, including the fundamentals of investing, understanding income taxation, and developing a healthy relationship with money

Community Service Chairman, Pi Kappa Alpha Fraternity Epsilon Nu Chapter

December 2021-July 2022

- Hosted community service events throughout downtown Atlanta, such as preparing meals for the ATL homeless population through collaboration with the Free99Fridge organization

AWARDS

Outstanding Financial Planning Undergraduate Student Award

Date Received: 4/26/2024

- Awarded at the UGA Financial Planning Banquet to one undergraduate student annually, recognizing campus involvement, engagement with professors and alumni, and academic excellence

AFCPE Symposium Knowledge Bowl Participant: 2nd Place

Date of Competition: 11/30/2023

- Competed in a team-based event at the AFCPE Symposium in New Orleans, showcasing knowledge of the Accredited Financial Counselor (AFCPE) curriculum alongside two additional UGA undergraduate students

CUSTOMER SERVICE EXPERIENCE

Newberry Properties- Core Spaces

Athens, GA

Community Concierge

February 2023- August 2023

- Provided community managers with property statistics, including current occupancy rates and late rent payments, and managed security deposits using Entrata Software

The Club @ SSI

Saint Simons Island, GA

Gym Receptionist

May 2022-August 2022

- Led data entry operations, tracked gym member activities, and assisted in billing for club members

CERTIFICATIONS

Certifications: eMoney, Holistiplan, MoneyGuidePro