

Joseph W. Chase

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Academic Experience

Suffolk University, Boston, MA
Expected Graduation December, 2009

31 Credit Hours Earned, 4.0 GPA
FMA National Honors Society

Selected Course Work

- ♦ **Finance 311**- Completed in depth research project on Citigroup's financial situation.
- ♦ **International Business Finance 417**- Analyzed PetroChina along with the entirety of the Chinese stock market regarding transparency and independence.
- ♦ **Finance 315**- Built a portfolio of stocks, options, and bonds to follow daily and analyzed with MPT.
- ♦ **Finance 411**- Built a portfolio of common stock, options, and futures and a tool to track the portfolio.
- ♦ **Finance 419**- Researched Jarden Corporation's value added to investors, WACC, optimal capital structure, and other areas of interest to investors.

Professional Experience

NUA Advisors, Lexington, MA, Formerly
Stirling Global Advisors, Wakefield, MA
Financial Research Intern

June, 2008 to Present

- ♦ Built tool in Excel to track client portfolios showing allocation, performance, and relative performance.
- ♦ Built indices on Bloomberg to test effectiveness of global diversification versus regional ETFs.
- ♦ Researched & recommended specific covered call option trades.

The Boston Society, Inc., Lexington, MA
Office Manager

January, 2009 to May, 2009

- ♦ Managed a small office while helping to organize pharmaceutical conferences.
- ♦ Maintained the company accounting system using QuickBooks.
- ♦ Answered vendor, customer, and partner questions via phone and e-mail.
- ♦ Updated marketing materials, including company website, using Adobe CS3.

Acronis, Inc., Burlington, MA
Research, Marketing, Office Assistant

July, 2007 to January, 2009

- ♦ Researched competitors' financial statements to determine ratios to help value the company.
- ♦ Scheduled Webinars in Webex and managed resulting leads in Salesforce.com database.
- ♦ Helped grow channel sales from 55% to 80% by researching over 4,000 individual contacts.
- ♦ Linked over 2,600 accounts to their parent accounts in Salesforce.com database.
- ♦ Applied naming conventions to sales database over 2 months, 15,000+ accounts.
- ♦ Filed and reorganized entire company's history of invoices, \$100mil+ worth of sales.

Skills

- ♦ **Computer:** Bloomberg, QuickBooks, Microsoft Office Suite, salesforce.com, Cisco Webex, HTML, Adobe CS3, web based email marketing services.
- ♦ **Language:** Conversational French