

# Grace M. Freund

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## Summary:

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I am a focused, innovative graduating senior at Purdue University who is creative, collaborative and enjoys solving problems and discovering new things. I am seeking a financial industry position that will allow me to continue to develop sales, relationship management, analytical and communication skills while working on impactful projects. I would bring a positive attitude, attention to detail and a willingness to learn while contributing to the workplace.

## Education:

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**Bachelor of Science in Finance**

**June 2025**

**GPA: 4.00/4.00**

- Dean's List
- Semester Honors
- Italy Study Abroad, Trieste, Italy

**Purdue University / Purdue Global**

**West Lafayette, IN**

## Employment:

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**Independent Advisor Services**

**Relationship Management (IASRM) LEAP Intern**

**LPL Financial**

**Fort Mill, South Carolina**

**June 2024 - August 2024**

- Analyze data, create processes, develop implementation strategy and visuals for Showpad, an internal training portal and resource hub to be used by IAS Relationship Managers upon implementation. (Capstone Project)
- Work cross-functionally to create Battlecards, a new resource designed to overcome sales objections, increase Independent Advisor retention, and mitigate loss.
- Presented data and strategy to teams regarding increasing efficiencies, training, and sales.
- Collect and organize data in early stage of FOCUS advisory Relationship Management Directory. Use Salesforce and CFX to manage Advisor exceptions for FOCUS event attended by over 8,500 Independent Advisors nationally.
- Immersed in LEAP Internship through all available opportunities and events at Fort Mills Campus.

**Financial Planning and Wealth Management Intern**

**Retirement Counseling Services, LPL**

**Indianapolis, IN**

**Summer 2022 & 2023**

- Developed portfolio projections, goal-based investment plans and college savings plans using financial planning software including Refinitiv Investment View Plus.
- Researched and presented investment options for corporate, individual, and municipality clients to senior advisors.
- Prepared for and attended client meetings with senior advisors to expand knowledge and learn best practices in client advising and client management.

**Disney College Program Intern**

**The Walt Disney Company**

**Orlando, Florida**

**August 2024 – November 2024**

- One of 9% of applicant chosen to intern 10 weeks full time for Disney's prestigious college program while also completing a full semester course load.
- Exceed high standards in customer service, sales, innovation, and professionalism while working operations in Magic Kingdom on Main Street, where guest first impressions are paramount.
- Trained in operations and service environments that prioritize excellence, attention to detail, and a strong work ethic.
- Complete certifications through Disney in finance, leadership, and innovation while networking with interns and global Disney professionals.

**Retail Sales Employee and National Warehouse Intern**

**Hot House Market**

**West Lafayette, IN**

**August 2021 – May 2024**

- Provide customer service and assist shoppers in retail boutique.
- Collaborate with team to manage inventory, stocking and supply chain while learning about the wholesale and resale business.
- Perform wide range of functions in national retail warehouse stocking multiple business locations.
- Multitask, use organizational skills and attention to detail to meet deadlines.
- Consistently exceed expectations through continuous improvement and fast learning.

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## **Employment:** (Continued)

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**Special Event Host and Catering Manager**

**Indianapolis, IN**

**Jugs Catering**

**May 2023 – August 2023**

- Work in suites to manage all aspects of catering events at Indy 500 and other events.
- Set up events and manage relationship with suite owners.
- Collaborate and support team members, stay customer focused and anticipate needs.

**Product Development**

**Fishers, IN**

**Surgical Drain Designs**

**August 2018 – August 2020**

- Started a business designing, sewing and selling post mastectomy drain belts to post-surgical patients, hospitals and surgery centers.
- Donated products to IU Cancer Center.

## **Honors and Awards:**

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**Purdue Semester Honors**

**Academic Honors in Physics**

**Purdue Deans List**

**HSE Foundation Academic Scholarship**

**Korean American Foundation Academic Scholarship**

**United Commercial Travelers Academic Scholarship**

**Indiana HOPE Academic Scholarship**