

ZACHARY RUBIN

Finance Major | Business Fellow | Wealth Management Intern

Stoneham, MA | 617-512-5919 | zacrubin2006@gmail.com | linkedin.com/in/zachary-rubin2006/

PROFESSIONAL SUMMARY

Finance major and Business Fellow with wealth management internship experience supporting advisory operations across 562 client accounts, plus entrepreneurial experience building revenue-generating e-commerce and AI website-services businesses. Strong foundation in client relationship management, account review, sales reporting, and financial operations; seeking a banking, wealth management, or markets internship where analytical rigor, client focus, and execution matter.

EDUCATION

High Point University — B.S.B.A., Finance; Minor in Sales

High Point, NC | May 2028

- Business Fellow; GPA: 3.7
- Dean's List: Fall 2024, Spring 2025, Fall 2025

FINANCE EXPERIENCE

Raymond James – Stoneham Bank | Wealth Management Intern

Stoneham, MA | May – Aug 2026

- Maintained client records and advisor meeting notes across 562 client accounts, improving continuity of relationship history and consultation preparation.
- Coordinated client meetings across multiple locations; communicated logistics clearly with clients and advisor to support a professional client experience.
- Reviewed brokerage, retirement, and managed account information to build working knowledge of portfolio structures, investment operations, and financial planning workflows.
- Supported account review, sales reporting, and client follow-up workflows while developing familiarity with advisory business operations and compliance-minded documentation.

ACADEMIC ACCOMPLISHMENTS

- Dean's List recipient for three semesters — Fall 2024, Spring 2025, and Fall 2025 — while maintaining a 3.7 GPA as a Finance major.
- Selected as a Business Fellow at High Point University, reflecting academic achievement and commitment to business leadership development.
- Led a team business case study for a real company; delegated roles, organized project work, and coordinated analysis of operational challenges.
- Presented a business concept in a freshman-year elevator pitch competition to judges and an audience, demonstrating entrepreneurial thinking and communication skills.

ENTREPRENEURIAL EXPERIENCE

theharmony888 | E-Commerce Clothing Brand

Dec 2022 – Jun 2025

- Founded and operated e-commerce clothing brand generating \$10,000 in revenue over two years; managed website operations, customer communication, and order fulfillment.
- Tracked margins, customer acquisition costs, marketing ROI, and retention activity to strengthen financial discipline and business decision-making.

SharpenIdea.com | AI-Powered Website Services

Jun 2025 – Present

- Built AI-powered website services business; managed client lifecycle from consultation and scoping through delivery and ongoing maintenance.
- Self-taught AI web development and translated client business needs into practical website updates, digital service offerings, and support plans.

ADDITIONAL EXPERIENCE

Mixx360 | Barback

Malden, MA | Dec 2021 – Present

- Processed POS transactions, reconciled cash, and supported event execution in a fast-paced hospitality setting while maintaining service standards.

Sogno | Dining Room Attendant

Woburn, MA | May – Aug 2026

- Supported servers in a high-volume fine-dining environment; prioritized table readiness, guest flow, and operational standards.

ACTIVITIES & SKILLS

- Leadership & Service: Mystic Valley Summer Camp Leader; Stoneham Soccer Club Volunteer

Finance & Analytical

Wealth Management
Brokerage & Retirement Accounts
Account Review; Sales Reporting

Client & Business

Client Relationship Management
Business Operations; Financial Management
E-Commerce; Customer Retention

Technical

AI Web Development
Website Design
POS Systems