Zane L. Glatman

22545 Canyon Crest Drive

Mission Viejo, CA 92692

(949) 510-4645 | zlglatman@crimson.ua.edu

**EDUCATION**

**University of Alabama Tuscaloosa, AL**

*Bachelor of Science in Business Administration / Finance/ Real Estate* Expected Graduation May 2025

* **GPA:** 3.15 / 4.0; ACT: 31
* **Honors:** UA Scholar Scholarship, UA Culverhouse School of Business Honors Program
* **Relevant Coursework:** Economics / Accounting / Technology in Business/ Business Presentations & Corporate Business Networking / Investment Banking / Business Law

**WORK & LEADERSHIP EXPERIENCE**

**Northwestern Mutual** ⏐**DJM Financial Newport Beach, CA**

*Financial Investment Operations / Internship* June 2022 – August 2022

* Analyzed and compiled financial data on Microsoft Excel templates creating Power Queries and Pivot Tables to expedite team projects and assignments.
* Created households for clients, which translate into more effective customer management for associates.
* Built graphic visuals for associates to prepare for daily incoming client wealth management meetings.
* Developed a stronger understanding for investment products build wealth to include: real estate, various insurance products, stocks, bonds, and commodities.
* Completed training and introduction to the wealth management sales cycle.
* Acquainted with the various steps of prospecting, researching, understanding client needs, planning, implementation, and review.
* Exposed to retirement planning and how it differs from wealth management as well as tax planning and strategies.

**Home Smart Evergreen Realty** **Mission Viejo, CA**

*Real Estate Assistant / Internship* January 2022 – Present

* Called prospective clients detailing current real estate market trends, seeking listings as well as buyers for Brokers.

**Bungalow Basics Newport Beach, CA**

*Supply Maintenance Manager / Driver* May 2021 – December 2021

* Performed delivery services for rental real estate owner, helping to manage supplies and tenant inquiries.

**North Shore Poke Mission Viejo, CA**

*Food Preparer / Front End Cashier* May 2018 – September 2019

* Ensured food stored and prepared according to FDA safety guidelines for customers.
* Managed front end cash register and customer service to guests.

**SKILLS, ACTIVITIES & INTERESTS**

**Languages:** Fluent conversational proficiency in Spanish and Hebrew

**Activities:** Sigma Chi National Fraternity, Intramural Soccer & Baseball

**Awards:**  National Honor Society, National Society of High School Scholars

**Interests:**

* + Passion for traveling internationally and immersing into different cultures.
  + Avid sports fan (Baseball/Basketball/Football)—love to play, watch live and fantasy.
  + Weightlifting and outdoor activities.