Cole Dalton

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EDUCATION

Saint Mary's College of California | Expected May 2028 | Moraga, CA

- Bachelor of Arts, Economics | Minor in Finance |
- Relevant Coursework: Financial Accounting, Econometrics, Banking & Monetary Policy (in progress); Intermediate Microeconomic Theory, Intermediate Macroeconomic Theory, Statistics, Applied Game Theory

EXPERIENCE

Business Insurance Underwriting & Risk Analyst Intern | Travelers | May 2026 – August 2026 | Walnut Creek, CA

- Analyzed commercial insurance account information for 500+ accounts in Travelers Workstation and Salesforce to support quoting, renewals, and risk evaluation.
- Evaluated geographic, financial, and operational data to identify risk factors and support underwriting recommendations across Workers' Compensation, Business Auto, and General Liability lines.
- Built Excel financial models and analytical tools to calculate insured-to-value ratios, supporting coverage-adequacy assessments in underwriting reviews.

Compliance Document Reviewer (Contract) | Align Advisor Services | 2026 – Present | Bay Area, CA

- Review and proofread SEC Form ADV Part 2A/2B disclosure brochures for registered investment adviser (RIA) clients before distribution, checking accuracy, consistency, and clarity.

Sales Intern | Qualcomm Snapdragon | Jun 2025 – May 2026 | San Francisco Bay Area

- Generated demand for Qualcomm Snapdragon-powered laptops through product demonstrations and customer engagement, averaging 130%+ of monthly sales quota.
- Tracked weekend sales trends and display performance at regional retail locations to support planning and marketing decisions.

Economic Development Committee Member | City of Pacifica | Nov 2025 – Present | Pacifica, CA

- Analyze local business and economic-development needs and work with the Economic Development Program to identify market gaps and support initiatives.
- Engage with businesses, residents, and community stakeholders; appointed to a four-year term through 2029.

ITS Media Services Intern | Saint Mary's College IT Services | Aug 2024 – Present | Moraga, CA

- Support hardware and software systems through device configuration, troubleshooting, and coding-related tasks, maintaining reliable technology across campus in a high-volume environment.

PROJECTS

Founder & Developer | Pryvo | 2026 – Present

- Building a web-based business intelligence tool that turns public company data into analysis of market position, competition, digital performance, and growth.

LEADERSHIP & ACTIVITIES

Founder & President | The Gael Group – Strategy Consulting Club | 2026 – Present | Saint Mary's College

- Founded and lead Saint Mary's first student-run strategy consulting organization, delivering client cases including a Costco corporate logistics engagement and advising organizations on growth strategy, market research, analytics, and operations.

Financial Analyst | Saint Mary's Finance Club | 2024 – Present | Saint Mary's College

- Help manage a diversified $300,000+ student-run investment portfolio; research companies, sectors, and financial markets to inform investment decisions.

Resident Advisor | Saint Mary's College of California | 2025 – Present | Moraga, CA

- Supervise and support 100+ residents; mediate conflicts, enforce housing policy, and serve as first point of contact for student concerns.

Member | Saint Mary's Men's Lacrosse | 2026 – Present | Moraga, CA

SKILLS

Technical: Microsoft Excel (Advanced; financial modeling) | PowerPoint | Salesforce | Tableau | SQL | SAP (FP&A) | Google Suite
Finance: Financial Statement Analysis | Credit & Risk Assessment | Financial & Data Analysis | Market Research