

DANIEL MARTINEZ

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Finance graduate with cross-cultural, client-facing experience across recruitment, mentorship, and consulting settings. Bilingual (English/Spanish) communicator who builds trust quickly, listens actively to diagnose what people actually need, and follows through to resolution. Seeking to bring that service foundation into wealth management client care.

EDUCATION

University of Tennessee, Haslam College of Business

Knoxville, TN

B.S. Business Administration – Finance | Collateral: International Business | GPA: 3.34 | May 2026

Universitat Autònoma de Barcelona (ISA by WorldStrides)

Barcelona, Spain

Study Abroad — Aug 2024 – Dec 2024

LEADERSHIP & RELATIONSHIP EXPERIENCE

Interfraternity Council (IFC), University of Tennessee — Recruitment Captain

Aug 2025

- Served as primary point of contact for potential new members during a high-volume, week-long recruitment cycle, using active listening and targeted questions to understand each potential new member's goals and match them to the right fit.
- Fielded and resolved questions from potential new members in real time under time pressure, escalating and tracking issues to the IFC Council to keep the process moving smoothly.
- Represented Lambda Chi Alpha throughout the process, maintaining professionalism and consistency across dozens of individual interactions.

Lead Scholars Program, University of Tennessee — Student Director

Aug 2025 – May 2026

- Built one-on-one relationships with program participants, using guided questioning to help each person define a clear goal and the steps to reach it.
- Facilitated group sessions and professional development workshops, keeping participants accountable to commitments over a full academic year.
- Delivered ongoing progress updates to participants, translating program activity into a clear picture of where each person stood against their goals.

Association of Latino Professionals for America (ALPFA) — Founding Member

Spring 2024 – May 2026

- Helped launch a new student organization from zero, building relationships with early members to grow engagement and retention.
- Collaborated cross-functionally with other student leaders on outreach and recruitment strategy.

PwC Explore Mentorship Program — Mentee

Jan 2024 – May 2024

- Built a professional relationship with a PwC mentor over a multi-month program, developing communication habits and industry fluency applicable to a corporate service environment.

ACADEMIC PROJECT

RECO Real Estate Brokerage — Consulting Engagement, Contributor

Jan 2026 – May 2026

- Advised RECO leadership on a Lebanon, TN office acquisition, communicating findings through a standardized integration playbook and agent retention strategy for a non-technical audience.
- Built a 90-day KPI dashboard so operational stakeholders could track post-acquisition performance without needing to interpret raw data themselves.

COMMUNITY SERVICE

Volunteer, Multiple Organizations

Knoxville, TN / Lyndhurst, NJ

Emerald Youth Foundation | Wesley House | Center for Basic Needs — 40+ Hours During College

- Mentored elementary and middle school students through Emerald Youth Foundation, and volunteered with Wesley House and Center for Basic Needs supporting local community needs.
- Assisted incoming students with university housing move-in support and participated in town clean-up initiatives.

SKILLS & CERTIFICATIONS

- Client Service & Communication: Active listening, needs diagnosis, relationship management, cross-cultural communication, verbal & written communication, meeting and workshop facilitation
- Languages: English (Native), Spanish (Fluent)
- Technical: Microsoft Office (Word, Excel, PowerPoint), Bloomberg Terminal (BFF & BQL Certified), basic computer hardware proficiency
- Certifications: AI for Business & Finance – Columbia University & Wall Street Prep (2026); Bloomberg Query Language (BQL) – Bloomberg for Education (May 2026); Bloomberg Finance Fundamentals (BFF) – Bloomberg for Education (Feb 2025); INROADS Financial Services Institute Program (Apr 2024)