

Isaac Benedict Adams

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EDUCATION

Barry University

Miami, FL

Bachelor of Business Administration in finance, Minor in Economics (GPA: 3.91/4.00)

Aug 2025 – Jun 2029

- **Relevant Coursework** – Intro to macroeconomic, Principles of microeconomics, Financial Accounting.
- **Programs**– Morgan Stanley Early Insights, Greenwood Project (Investment Academy), Bloomberg Market Concepts, J.P. Morgan Investment Banking Simulation, Financeable Excel Skills for Investment Banking.

EXPERIENCE

Greenwood Project

Chicago, IL

Investment Academy Scholar

Jul 2026 – Present

- Selected as a Scholar in the Greenwood Project Investment Academy, a competitive 10-month program designed to prepare sophomores for junior-year finance internships and careers in the financial services industry
- Completing rigorous training through virtual sessions, courses, and projects focused on building foundational industry knowledge, technical skills, professional clarity, and corporate culture fluency
- Engaging in structured networking with corporate volunteers and finance professionals to expand industry connections and gain insights into investment banking and related fields
- Participating in an enhanced coaching and mentorship program that provides tailored guidance on career development, internship preparation, and professional skill-building

Barry Student Managed Investment Fund

Miami, FL

Healthcare and Alternative Investment Analyst

Sept 2025– Present

- Devised daily/weekly commentary by utilizing Bloomberg and Factset data to summarize debt transactions and performances across yields and major indices.
- Improved my assigned securities in healthcare, energy sector and alternative investment to yield an annualized return of 23.6% in comparison to the S&P 500 return of 14.9% in the portfolio.
- Optimized cash drag in the portfolio by developing a ladder short-term strategy, increasing the portfolio fund's yield on uninvested capital from 2.5% to 4.8% annually.
- Maintained capitalization tables on quarterly basis for healthcare companies (\$350B+market cap) in the portfolio; tracked capital structure changes after earnings releases to identify pitching opportunities.

Costco

Dallas, TX

Financial Reporting Intern

May 2026– August 2026

- Assisted in the preparation and review of internal and external financial statements, including the quarterly and annual SEC filings, while ensuring full compliance with U.S. GAAP
- I designed, developed, maintained, and supported the company's financial reporting platform in OneStream to streamline consolidation and reporting processes
- Contributed to the management of monthly and quarterly accounting closes, enabling timely and accurate financial reporting across the organization
- Partnered with accounting teams and subsidiaries to compile, analyze, and review consolidated income statements, balance sheets, statements of cash flows, and detailed supporting schedules

LEADERSHIP & ACTIVITIES

Barry Men's Soccer Player

Miami, FL

Student-athlete

2025 – Present

- I participated as a walk-on player, participating in team practices, scrimmages, and matches to support Division II NCAA competitions, enhancing teamwork, discipline, and physical resilience under Coach Petsa Ivanovic.
- Engaged in community outreach events tied to the program, fostering leadership and cultural exchange while balancing rigorous athletic commitments with academic demands in my coursework.

Barry University Emerging Leaders Program

Participant

August 2025 – June 2026

- Selected to join a competitive leadership development program focused on building professional and personal growth.
- I participated in interactive workshops, mentorship sessions, and community-based projects emphasizing ethical leadership, social responsibility, and collaborative problem-solving.

ADDITIONAL INFORMATION

Skills–Bloomberg Terminal, Factset, Claude Code, Canvas

Activities–, NCAA Soccer (Division II), 2026 FIFA World Cup Volunteer (Dallas), Barry Student Managed Investment Fund (SMIF), Barry AI Society

Interest– Soccer (FC Barcelona), Formula 1 (Ferrari), Concerts (Coldplay, Drake, Kanye West), Extreme adventure (skydiving with no instructor)