

Ty Harkness

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PROFESSIONAL SUMMARY

Finance graduate with consultative sales and client-facing experience helping customers identify needs, understand financial options, and make informed decisions. Conducted 120+ in-home client consultations while managing multiple priorities, follow-ups, and client relationships in fast-paced environments. Passed the Securities Industry Essentials (SIE) Exam, with a strong interest in building a long-term career in financial advice and wealth management and completing the Series 7 and Series 66.

EDUCATION

University of Georgia, Athens, GA

Bachelor of Finance | GPA: 3.5/4.0

May 2025

EXPERIENCE

In-Home Sales Consultant

February 2026 - June 2026

Home Genius Exteriors - Meriden, CT

- Conducted 120+ in-home client consultations for projects averaging approximately \$24K, using needs-based questions to identify priorities, concerns, and financial needs.
- Recommended project and financing solutions based on client priorities, budget, and needs, while clearly explaining pricing, timelines, options, and tradeoffs.
- Built strong client relationships through clear communication, active listening, and timely follow-up.
- Managed multiple active client needs simultaneously while coordinating with internal teams to resolve questions and keep projects moving forward.
- Maintained accurate records of client discussions, proposals, follow-ups, and next steps in a fast-paced, performance-driven environment.

Server/Bartender

2021 - 2024; June 2026 - Present

LongHorn Steakhouse - Southington, CT

- Deliver attentive service in a high-volume environment while building rapport and responding quickly to customer needs.
- Resolve customer concerns and special requests quickly while coordinating with coworkers and managers.
- Manage multiple customer interactions at once while maintaining accuracy, professionalism, and attention to detail.
- Process cash and card transactions accurately throughout each shift while maintaining accountability for payments and receipts.

Co-Founder / Financial Operator

June 2025 - February 2026

Advantage LLC - Nationwide

- Managed approximately \$95K in capital and generated roughly \$75K in revenue over eight months through disciplined financial analysis, risk management, and decision-making.
- Built advanced Excel models to track results, simulate potential outcomes, evaluate opportunities, and support financial decision making.
- Monitored financial activity and performance closely while maintaining accurate records and reporting.
- Coordinated independently operating personnel across 42 U.S. states and Canada while maintaining clear performance expectations and reporting discipline.

SKILLS

Financial: SIE Passed, Financial Analysis, Financial Modeling, Risk Management, Capital Allocation

Client & Sales: Client Relationship Development, Needs Discovery, Issue Resolution, Active Listening

Technical: Advanced Microsoft Excel, Microsoft Office, Google Workspace, CRM Systems