

# James Willsen

Jameswillsen2026@gmail.com | linkedin.com/in/jameswillsen

113 Weaver Road  
West Sayville, NY 11796  
(631) 838-2331

## EDUCATION

**The University of Scranton**, Kania School of Management

*Bachelor of Science in Finance*

- Overall GPA: 3.63/4.00
- Loyola Scholarship
- Dean's List

**Scranton, PA**

*Anticipated Graduation May 2026*

**Sayville High School**

*Advanced Regents Diploma*

- Overall GPA: 3.81/4.00

**Sayville, NY**

*June 2022*

## PRACTICAL EXPERIENCE

**Santander**

*Real Estate Investment Management Intern*

- Conducted annual loan reviews for a portfolio of multifamily real estate across the NYC metropolitan area, analyzing cash flows, debt service coverage ratios, and occupancy metrics to assess loan performance and assign internal risk ratings
- Performed detailed financial analysis of rent rolls, operating statements, and borrower submissions to assess property level performance and ensure covenant compliance
- Attended and contributed to weekly team meetings, providing updates on loan review progress and discussing trends in property performance across the portfolio

**New York, NY**

*June 2025-August 2025*

**Morgan Stanley**

*Wealth Management Intern*

- Participated in team meetings and collaborated with colleagues on various projects, gaining insights into asset allocation strategies and financial planning techniques
- Engaged in educational sessions and workshops led by industry experts at the Global Investment Office, gaining exposure to advanced investment strategies and market research
- Received mentorship from senior advisors and participated in networking events to expand professional connections within the industry
- Participated in meetings with portfolio managers and analysts to discuss market trends, economic indicators, and potential risks, contributing insights to the decision-making process

**New York, NY**

*June 2024-July 2024*

**Sketched Project**

*Owner & Founder*

- Developed and executed comprehensive business strategies, resulting in consistent year-over-year revenue growth and profitability within a competitive industry
- Managed end-to-end operations, from sourcing high-quality materials to overseeing production processes, ensuring products consistently met and exceeded industry standards
- Successfully managed all aspects of the business, including financial planning, inventory management, marketing, sales, and customer relations, showcasing a well-rounded skill set

**Sayville, NY**

*March 2020-October 2023*

## LEADERSHIP EXPERIENCE

**The Sayville Highschool Band**

*Trumpet*

- Collaborated effectively with other band members, including following cues, playing in unison, and maintaining appropriate dynamics
- Performed in various concerts, recitals, and competitions
- Exhibited strong dedication and work ethic in preparing for performances and practicing independently
- Demonstrated strong musical knowledge and theory, including an understanding of scales, key signatures, and rhythm
- Participated in band leadership roles, including serving as section leader, contributing to positive team culture, and building camaraderie among band members
- Engaged in fundraising and community outreach efforts to support the band program and promote music education

**Sayville, NY**

*September 2013-June 2021*

## ADDITIONAL INFORMATION

*Skills:* Web Design, Video Editing Software, Social Media, Excel, PowerPoint

*Interests:* Golf, MMA, Fishing, Hunting