

Luke Merlan

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EDUCATION

The University of Scranton, College of Arts and Sciences, Kania School of Business
Bachelor of Science: Mathematical Sciences, Finance

Scranton, PA
Anticipated Graduation May 2026

- Overall GPA: 3.9/4.0
- Dean's List: All Semesters

CFA® Program Candidate, CFA Institute

- Pursuing Exam I Certification

Pembroke Public High School

Diploma

Overall GPA: 4.7/5.0

Pembroke, MA
Class of 2022

PRACTICAL EXPERIENCE

Morgan Stanley

Private Wealth Management Intern – The Winter Street Group

Wellesley, MA
May 2025 – August 2025

- Presented a mock client pitch showcasing Morgan Stanley's wealth management services and solutions
- Provide advisors with mock investment strategies based on client risk tolerance and expected returns
- Research and analyze recent M&A activity to support advisors with prospective clients

Tutor

Mathematics

Scranton, PA
August 2023 - Present

- Tutor mathematics classes from pre-calculus to calculus III, linear algebra, and proofs
- Assist students in developing critical thinking and study tools
- Communicate complex math concepts in an understandable way

Boston Golf Club

Caddy

Hingham, MA
May 2023 - Present

- Manage multiple factors (caliber of player, weather, pace of play) to ensure anticipated start time on first tee
- Carry the golf bags of members and guests, assess their desired level of communication to provide the best experience possible
- Provide members and guests with high level tips and advice around the course to maximize their experience

ACTIVITIES

Wall Street Bootcamp Program

Participant

Scranton, PA
February 2023 – May 2023

- Attended weekly sessions that developed necessary finance skills
- Studied concepts such as multiples analyses, discounted cash flows and three-statement models
- Learned how to value a stock, pitch a stock, and navigate recruitment processes

The University of Scranton's Investment Club (PRISM)

Analyst

Scranton, PA
August 2023 – Present

- Manage a student-run investment fund responsible for \$900,000 of the University's endowment
- Discussed and analyzed macroeconomic trends
- Contributed to the analysis of stock pitches and the fund's current holdings

LEADERSHIP EXPERIENCE

NCAA DIII Golf

Varsity Golf Team Captain

Scranton, PA
August 2022 - Present

- Motivated team to work hard and achieve individual and team goals while promoting a safe environment
- Landmark Conference champions for 2023 and 2024
- Invited to DIII National Invitationals for 2023 and 2024

Pembroke High School Marching Band

Marching Band Drum Major

Pembroke, MA
August 2021 - May 2022

- Led band and helped music directors position members during band training and performances
- Functioned as the conduit between members and directors of the band
- Conducted the band and communicated during shows to ensure everyone was together and on time

OTHER INFORMATION

Skills: Microsoft Office, Python, R, Financial Analysis, Salesforce, Bloomberg

Interests: Golfing, Piano, Biking, Skiing, Travel, Surfing, Algorithmic Trading