

Alexander J Boykas
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Education

University of Notre Dame South Bend, IN
Master of Business Administration candidate, Strategy May 2024
• Kenneth R. Meyer Fellow, President of MBA Consulting Club 3.72 GPA
• GMAT 720

Franklin & Marshall College Lancaster, PA
Bachelor of Arts (BA) - Economics May 2015
• President of Kappa Sigma Fraternity, Founding Member of Club Lacrosse Team

Experience

Ernst & Young New York, NY
Business Consulting Intern Summer 2023
• Collaborated with executive leaders to execute operational integration of a \$10bn+ M&A deal while overseeing 20 separate sub-workstreams
• Produced financial models to guide senior leadership regarding profitability of potential new firm business engagements
• Participated in formulation of comprehensive pitchbooks incorporating strategic insight in response to industry requests for proposals
• Won practice-wide intern case competition focused on Generative AI and future applications in the financial services industry

Douglas C Lane & Associates New York, NY
Associate 2019-2022
-Operations & Technology
• Led multiple operational and strategic upgrades; developed and implemented a streamlined block order creation to cut time between initiation and execution by multiple trading days
• Spearheaded adoption of new client relationship management tools to increase visibility, improve operational efficacy, and ensure compliance; converting 5,200+ of client accounts with 100% accuracy
• Created cloud-based system to enable real-time collaboration and consolidation of current client service items, facilitating clearer communication and assessment of department's productivity and efficacy
-Client Relationship Management
• Developed and maintained strong client relationships to ensure optimal customer experience; discussed firm strategy, account details, client preferences and liquidity needs; achieved 97% client retention
• Identified and recommended fixed income opportunities meeting yield, suitability and risk tolerance standards
-Research & Trading
• Partnered with multiple outside bond and equity sales teams for block purchases; facilitated time sensitive, high-volume trades and completed multifaceted client allocation process
• Managed team of four traders that executed 200+ equity, fixed income, alternative, and mutual fund trades daily; personally executed and allocated firm's largest, most complex transactions; 99.99% accuracy rate on trades
-Management & Culture-Building
• Directed training and on-boarding efforts for new client service and trading hires
• Culture committee member charged with helping partners improve firm's culture after managerial transition; focused on associate/partner dynamics and career pathing, leading to significantly less junior employee turnover

Fidelity Investments New York, NY
Financial Representative 2015-2019
• Educated clients on services and products to empower client to monitor and manage investments
• Resolved complex transactions and services in collaboration with senior advisors and operations teams, providing a smoother experience for clients
• Identified and transitioned over \$75mm of new client assets to senior advisors, expanding products and services available to clients and increasing likelihood of account growth and retention for Fidelity

Achievements & Interests

CFA Institute June 2019
Passed CFA Level II
• Sailing, English Soccer, Amateur Film Critic