

Connor W. Greep

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Executive Summary

Finance major at the University of Central Florida with a strong interest in markets, valuation, and client-facing roles. I've built experience through internships, leadership positions, and UCF's Professional Selling Program. I'm driven by curiosity, enjoy solving problems, and bring a competitive mindset to everything I do.

Education

University of Central Florida

Bachelor of Science in Business Administration, Finance

Minor: Professional Selling

- 4.0 Major GPA
- 3.4 Cumulative GPA
- Relevant Coursework: Business Finance, Debt and Money Markets, Corporate Finance Quantitative Business Tools 1,2&3, Equity and Capital Markets

Experience

Portfolio Analyst Greep Wealth Management

Sep 2024 - Present

- Review of Current Portfolios Outline Client's short, medium, and long-term financial goals
- Manage various risk tolerances
- Learned many valuable lessons such as risk management, selling businesses, serving clients in an objective fiduciary role, decision making, projecting cash flow needs
- Met with individuals in different sectors of finance such as Investment banking and wealth management

Accounting/Donor Management Internship at Calvary Chapel FTL

May 2023 - Aug 2023

- Learned from all Accounting and Finance positions firsthand what they did and why
- Became efficient with QuickBooks and other platforms in Accounts Payable, Receivable, etc.
- Created and updated Excel spreadsheets for budgeting and planning purposes
- Enhanced written and verbal communication through donor engagement and interdepartmental collaboration.

POWR Karate

Jan 2023 - Sep 2023

- Led 25+ elementary school children in after-school activities
- Marketed the organization to various elementary schools students and parents
- Tailored classes depending on individual's learning style

Certifications

- EverFi Financial Solutions, NAFTrack Certified
- PowerPoint, Word, Excel, Quickbooks Certified
- Securities Industries Exchange (SIE) Certified
- Pursuing Series 65 Certification

Honors & Activities

Phi Delta Theta Fraternity – University of Central Florida

- Philanthropy Chair/Executive Board member (Nov 2023-Nov 2024)
- Recruitment Board member (Jan 2023-Present)
- Sports Chairman (Aug 2023-Dec 2023)
- Rush Chair (Jan 2025-September 2025)
- Started the first Phi Delta Theta Bible study at UCF

Antioch Church – Orlando, Florida

- College life group/small group leader (October 2025-Present)
- Serve on the setup and breakdown team (Jan 2022-Present)
- Leader/marketer/organizer of Welcome Week event that attracted 700+ UCF students
- Participated in 7 Mission trips including a six-week trip to Portugal and Japan
- Helped lead a team on a mission trip to Belize May 2025 for 10 days

High Honor Roll Dean's List – University of Central Florida Young Investors Club- Member