

Esha Patel

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EDUCATION

Rutgers University

Bachelor of Science in Finance

Minor in Global Business & Political Science

New Brunswick, NJ

September 2023 – May 2027

PROFESSIONAL EXPERIENCE

Northbridge Business Analytics Group

Business Analyst Intern

Remote

June 2026 – August 2026

- Built financial dashboards tracking revenue, expenses, margins, & KPIs to enable data-driven decisions
- Developed revenue forecasts using historical data, market research, and business assumptions
- Analyzed business processes & competitors to identify gaps and support strategic recommendations
- Prepared business reports, documents, & presentations translating analysis into actionable insights

Peacock Wealth Solutions LLC

Administrative Assistant

New York City, NY

March 2023 – December 2025

- Supported 30+ clients through financial documentation, correspondence, & account servicing
- Helped clients onboard by filing confidential financial records & resolving documentation needs
- Prepared portfolio materials and financial reports for advisor meetings and investment discussions
- Collaborated with advisors to ensure accurate records, compliance, reporting, and internal reviews

Environment New Jersey

Canvassing Representative

New Brunswick, NJ

June 2025 – August 2025

- Conducted high-volume outreach to communicate initiatives and increase community engagement
- Tailored messaging to resolve concerns, overcome objections, and drive engagement
- Captured stakeholder feedback to improve outreach strategy and campaign decision-making
- Managed campaign materials and field resources to support cost-conscious outreach operations

Ulta Beauty

Beauty Advisor / Sales Representative

Freehold, NJ

July 2024 – January 2025

- Delivered personalized product recommendations based on customer needs and purchase behavior
- Supported sales goals through product launches, promotions, and loyalty-driven engagement
- Communicated customer preferences and product trends to support team selling strategies

TECHNICAL SKILLS, ACTIVITIES & INTERESTS

Technical Skills: SQL | Microsoft Office | Microsoft Excel | Tableau | Power BI | JavaScript

Activities: Women in Business, LIBOR, Corporate Finance Society, FBLA, DECA

Interests: Pickleball, Lifting, Movies, Traveling, Baking, Music, Basketball, Running

Languages: English, Gujarati, Hindi

LEADERSHIP AND EXTRACURRICULARS

Personal Project Portfolio

Portfolio Manager

New Brunswick, NJ

September 2025 – Present

- Tracked an 8–12 security portfolio against the S&P 500 to evaluate performance
- Built an Excel dashboard to monitor holdings, weights, returns, and benchmark trends
- Analyze financial performance and market trends to support investment decisions
- Forecasted Ulta Beauty revenue using 3–5 years of historical financial data

Omega Phi Alpha – Professional Service Sorority

President

New Brunswick, NJ

September 2025 – Present

- Lead chapter operations, member engagement, and professional development programming
- Coordinate service events and professional programming to strengthen chapter involvement
- Manage recruitment, event planning, and organizational initiatives for chapter growth