

NOAH RYCHLICK

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EDUCATION

The University of Tampa , Tampa, FL	Expected May 2027
<i>Bachelor of Science in Finance</i>	
GPA: 3.4 Relevant Coursework: Financial Modeling, Business Analytics, Statistics, Risk Management	
Drake University , Des Moines, IA	Aug. 2022 – May 2024
<i>Bachelor of Science in Finance (transferred after sophomore year)</i>	
GPA: 3.5 Dean's List Division I Student-Athlete (Football)	
Ciudad del Saber , Panama City, Panama – <i>Study Abroad, International Business & Economics</i>	Summer 2024

PROFESSIONAL EXPERIENCE

Summit Wealth Strategies – An Arax Advisory Partners Firm	May 2026 – Present
<i>Wealth Management Intern</i>	
- Support advisors serving high-net-worth individuals, families, and business owners in a fiduciary practice within Arax, a \$35B+ wealth and asset management platform. - Contribute to portfolio analysis and investment reporting, reviewing asset allocation and portfolio exposures and supporting client deliverables tied to long-term planning and performance tracking. - Maintain and review client documentation, keeping performance statements, tax documents, and investment records complete and aligned across accounts. - Research financial planning system integration, linking planning assumptions across platforms and evaluating tool compatibility for forecasting, income planning, and portfolio analytics. - Build Wealthbox CRM workflows, tasks, and data pulls, and deployed two Microsoft Power Automate agents now live for firm leadership: tier-based email triage that routes each message to the right advisor, and client birthday outreach driven by Wealthbox digests. - Developing a weekly client market commentary email and one-page brief built from the firm's internal research.	
BoxCast, Inc.	Jun. 2026 – Aug. 2026
<i>Accounting Intern</i>	
- Ran Stripe Sigma reports on customer billing data and built Excel spreadsheets that surfaced and highlighted key account details for review. - Researched VAT and tax ID requirements for UK and EU customers, verifying registration numbers and entity details across sales tax records. - Labeled audio in Audacity to build training data for an AI model behind hardware that automatically detects, labels, and adjusts audio levels; used Python to verify label accuracy.	
Paskar Construction , Minneapolis, MN	May 2025 – Aug. 2025
<i>Sales Representative</i>	
- Ran door-to-door, relationship-driven sales for roof inspections and storm-damage insurance claim consultations. - Guided homeowners through the insurance claim process, working with adjusters and project managers to close roofing and exterior contracts.	
Wheel & Wave Detailing , Wayzata, MN	May 2023 – Aug. 2025
<i>Founder & Owner</i>	
- Founded and ran a mobile automotive and marine detailing business, handling pricing, scheduling, service delivery, and customer relationships. - Built the website and booking system and ran Instagram, Facebook, and paid ad campaigns that brought in new and repeat clients.	

LEADERSHIP & ATHLETICS

Drake University – Division I Football	Aug. 2023 – May 2025
Two-time Pioneer Football League Conference Champion; balanced a 25–30 hour weekly athletic commitment with a full course load.	

SKILLS

Finance: Portfolio analysis, asset allocation, investment reporting, financial statement analysis, DCF modeling, risk management
Client & Sales: Client service, relationship management, needs-based selling, negotiation
Technology: Wealthbox CRM, Fidelity, Microsoft 365 (Excel – advanced, Outlook, SharePoint, Teams), Power Automate, Stripe Sigma, Python (basic), Audacity, Bloomberg (coursework)