

Adam R. Pavliga

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EDUCATION

The Ohio State University, Max M. Fisher College of Business

Bachelor of Science in Business Administration

- Specialization: Finance

Columbus, OH
Graduated: May 2025

FINRA Licensing

- Currently holding the following certifications in good standing: SIE, Series 7, Series 63

Chicago, IL
October 2025

WORK EXPERIENCE

E*TRADE from Morgan Stanley

Client Relationship Manager

Chicago, IL
August 2025 - December 2025

- Manage high-volume inbound client calls, providing real-time solutions to complex inquiries related to investment accounts, trading platforms, technical issues, and account maintenance.
- Facilitate wire transfers, ACH transfers, and ACAT transfers for clients accurately and efficiently while maintaining regulatory and compliance standards.
- Drive new Assets Under Management (AUM) by educating clients on current E*TRADE promotions and identifying opportunities to consolidate or transfer assets.
- Identify clients with planning or complex financial needs and refer them to Morgan Stanley Financial Advisors, contributing to firm-wide lead generation and holistic wealth management.

Scioto Country Club

Honors Caddie (Seasonal)

Columbus, OH
June 2017 – July 2025

- Performed tasks for golfers during their round by carrying clubs, giving advice on what shot to hit, reading greens, giving yardages, and cleaning clubs and golf balls to better their experience.
- Collaborated with other caddies in a team setting to provide our golfers with the highest level of customer service experience.
- Build and maintain lasting relationships with the members throughout the years to enrich their experiences and sense of belonging at the club.

Columbus Country Club

Honors Caddie (Seasonal)

Columbus, OH
June 2022 – July 2025

- Supported the training and development of new caddies and helped advance their skills to allow for promotion.
- Provided personalized assistance to the members both on and off the course by developing relationships with members that evolved into weekly rounds of golf.

INVOLVEMENT & PROFESSIONAL DEVELOPMENT

The Common Cents Investment Group

Student Member

Columbus, OH
August 2024 – May 2025

- Analyzed public equities, derivatives, options trading, M&A transactions, leveraged buyouts, and swaps.
- Gained exposure to careers in the financial sector including investment banking, sales & trading, private equity, wealth management, financial advising, and asset management is also a regular topic, as are guest speakers who work in these professions.

St. Paul's Outreach

Student Missionary Leader

Columbus, OH
August 2022 – May 2025

- Led 150 college men in learning about what it means to be a man living a life for Christ through facilitating small group discussion that give the men the space to grow their relationship with God and become leaders for others.

Financial Planning Association of Central Ohio

Member

Columbus, OH
December 2025 – Present

- Active member of the FPA of Central Ohio for further development of financial planning skills and knowledge