

Name

Address-----

xxx-xxx-xxxx

Address-----

gmail.com

Education

School

May 2022

Bachelor of Science in Business, Concentration: Finance

city

GPA: 3.6 /4.0

Relevant Skills: Bloomberg Terminal, Microsoft Office Suite, SEC Edgar Database, FactSet, YCharts, SQL, Salesforce, Python, Tableau

Selected Achievements

- Financial Modeling & Valuation Analyst (Corporate Finance Institute)
- FINRA Securities Industry Essentials Exam (ID: T0157291)
- Bloomberg Market Core Concepts Certification (ID: 156864800695)
- Dean's List: 2020 Spring, 2020 Fall, 2021 Spring, 2021 Fall, 2022 Spring, Latin Honors Medal
- Proficient in English, Spanish & Arabic

Professional Experience

----- Wealth Management

Sept 2021 - Present

Client Relationship Manager

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- Contributed to the addition of over \$50,000,000 AUM in less than a year of employment
- Advised over 100+ high net worth clients with \$1M+ portfolio sizes while achieving the highest client satisfaction
- Achieved optimal levels of personal performance demonstrated by a 96% project success rate

----- Wealth Management

Summer 2021

Wealth Management Intern

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- Collaborated with senior management to oversee portfolio construction & supervision
- Analyzed client finances and formulate solutions that incorporate risk management and wealth accumulation
- Established a lasting client base by building relationships based on reliability and need fulfillment

Retail Auto

Jan 2019 – Jun 2021

Procurement Manager

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- Managed procurement and export of \$50k+ worth of vehicles weekly, averaging ~\$3M per year
- Orchestrated a lucrative \$8M+ sports car deal with a luxury rental company based overseas
- Streamlined business operations to eliminate 25% of shipping fees and exporting expenses

Technical Training

Nov 2018 – Aug 2021

Athletic Trainer & Marketing

city

- Directed several marketing projects involving high-profile professional soccer players
- Conducted 10-12 weekly group training sessions with top youth soccer talent in the state

Leadership Experience

Soccer

Aug 2017 – Nov 2018

Athlete (Goalkeeper)

Spain

- Displayed leadership qualities on and off the field that lead to becoming the youngest captain
- Dedicated 25-30 hours a week with training, travel, and games all during the semester
- Featured in games against the top professional soccer academies and national teams in Europe
- Became the youngest athlete promoted to the first team at 17 years old

My company

Mar 2020 – Jun 2021

Founder & Business Manager

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- Built a retail automobile business aimed to source vehicles nationwide, generating \$6,000+ monthly net income
- Utilized auction access to provide several vehicle options at prices just above wholesale value
- Offered financial consulting services to help customers responsibly finance their purchases