

# Name

Address  
Contact Info  
LinkedIn

## EDUCATION

---

### **Extreme Non-Target School**

*Bachelor of Science in Finance*

**Some City, NJ**

December, 2013

- **GPA:** 3.5
- **Relevant Coursework:** Financial Management I & II, Financial Accounting, Managerial Accounting, Investments, Macro & Micro Economics, Statistics.

## WORK & LEADERSHIP EXPERIENCE

---

### **Discount Brokerage Firm.**

*Investment Consultant*

**Some City, NJ**

July 2014 – Present

- Consulted with clients about choosing and implementation of investment strategies, taking into account their investment goals and suitability.
- Conducted portfolio reviews with clients educating them about strategies, asset allocations, and research.
- Provided market news, events, and general macroeconomic information that related to market movement.
- Sales & Business Development.

### **Big Bank – Retirement Services Division**

#### **Global Wealth and Investment Management**

*Participant Services Representative*

**Some City, NJ**

December 2013 – July 2014

- Enrolled and assisted participants with 401k transactions and inquiries such as loans, fund transfers, distributions, rules, and regulations.
- Educated participants about the different types and style of investments provided in their 401k plan along with general asset allocation education.
- High performing rep who was assigned as a mentor for incoming reps within two months of being hired.

### **Big Bank – Retirement Services Division**

#### **Global Wealth and Investment Management**

*Summer Temp.*

**Some City, NJ**

Summer 2013

- Produced daily, weekly, and monthly reports used and analyzed by senior management often requiring tight deadlines.
- Given a multitude of different responsibilities requiring heavy multi-tasking and coordination.

### **Discount Brokerage Firm.**

*Intern*

**Some City, NJ**

2010 – 2013

- Cultivated business relationships by providing exceptional service and detailed product knowledge which had a direct effect on client satisfaction and increased revenue for the firm.
- Research and report company news and quotes to clients and handle general inquiries.

### **Cellular Provider**

*Retail Sales Representative*

**Some City, NJ**

2008 – 2010

- Consistently exceeded monthly revenue quota by understanding customer needs and upselling to their wants by presenting products and features in a clear and concise manner.
- Lead rep at kiosk location responsible for handling cash management and daily reporting to management.

## SKILLS, CERTIFICATIONS & INTERESTS

---

**Skills:** Advanced proficiency with Excel, Intermediate Word and PowerPoint.

**Certifications:** Series 7, Series 63.

**Interests:** Snowboarding, Cliff jumping, Fitness.