

Phone | Address | Email | LinkedIn

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## Entry-Level Financial Analyst

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**FINANCIAL ANALYSIS**

|                          |                     |                           |
|--------------------------|---------------------|---------------------------|
| Financial Data Analysis  | Database Management | Management Reporting      |
| Beta Estimation Analysis | DCF Models          | Quarterly Report Analysis |

**SELECTED SCHOOL COURSEWORK**

|                                   |                             |                                   |
|-----------------------------------|-----------------------------|-----------------------------------|
| Allocation of Financial Resources | Financial Policy / Analysis | Portfolio Performance Evaluations |
| Capital Budgets                   | Global Financial Valuation  | Risk Management                   |
| Financial Decision-Making         | Internal Control Strategies | Technical Analysis                |
| Fundamental Analysis              | Portfolio Management        | Working Capital Management        |

**SALES / BUSINESS DEVELOPMENT**

|                                     |                     |                               |
|-------------------------------------|---------------------|-------------------------------|
| Customer Service / Retention        | Documentation       | Regulatory / Legal Compliance |
| Cross-Department Liaison            | Field Canvassing    | Salesforce                    |
| Cross-selling Products and Services | Post-Sale Follow-up | Territory Action Plans        |

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### Work Experience / Internship

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*Confidential* Company Name      *Outsourced sales and marketing solutions*      (COVID layoff) Jan – July 2020

***Confidential* Car Manufacturer Recall Specialist**

Managed San Francisco Bay Area territory to ensure that critical recalls were completed on vehicles. Government-mandated best efforts were made to reach customers regarding airbag dangers.

- Analyzed and utilized key information for individual vehicles to create daily territory action plans.
- Coordinated with dealerships to increase recall completion rates.
- Served as liaison between customers and Service Departments to identify and refer customers requiring additional follow-up.
- Prepared and recorded all information to specific requirements in Salesforce.
- Conducted field canvassing at identified addresses to facilitate repairs or close cases with required documentation.
- ✓ Top 3 out of 30 Specialists in completing recall appointments in multiple weeks.

**Tools for Transition Entry-Level Sample Resume**

*Confidential* Bank, City

2018

**Loan Documentation Department Intern (6-month internship)**

Learned all aspects of a Loan Document Specialist's role and responsibilities, including the process of servicing loans starting from customers' first contact to processing mortgage loan payoffs.

- Enrolled in a school course, "Student-Managed Investment Funds." Key member of team that managed \$500K portfolio of investments.
- Participated in major project to transition paper documentation to a new online documentation system.

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**Profile**

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**Education**

*Confidential* University

Bachelor of Science (BS), *Finance*, 2018

- Dean's List multiple semesters
- *Confidential* Conference Scholar Athlete, Football

College of San Mateo

*Confidential* Conference Scholar Athlete, Football

- Ranked 5th in the nation as an Offensive Lineman for junior colleges

**Honors and Awards**

Scholar Athlete

First Team All-State Offensive Lineman 2015

Scholastic Honors Society Invitee

Received more than 10 scholarship offers from colleges / universities

**Sports Leadership**

Placed in the top 3% of high school athletes in the nation

Dean's List for academics

Team Captain

**Technical Skills**

Salesforce

Microsoft (Word, Access, Excel, PowerPoint)