

# Client Name, MBA

Address, City, State

Phone: 123-456-789 ♦ clientname@yahoo.com

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## Financial Analyst

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Brilliant, energetic and talented MBA graduate with extensive knowledge of banking and financial principals. An articulate communicator fluent in English and Urdu/Hindi and possess the ability communicate and work well with others. With over 6 years of experience in the banking industry and a Masters of Business Administration, ready to make a valuable contribution of a member of an interdisciplinary team. Prepared to use work experience and education to excel in different financial initiatives across various institutions such as hospitals, brokerage firms and non-profit organizations and of course, financial. Possess strong attention to detail, a keen analytical mind and a willingness to learn and grow.

### Core Strengths

- ♦ Portfolio Management
- ♦ Hedge Analysis
- ♦ Data & Analysis
- ♦ Risk Management
- ♦ Quantities Analysis
- ♦ Data Queries
- ♦ Strategic Development
- ♦ Due Diligence
- ♦ Policies & Procedures
- ♦ Supervision & Training
- ♦ Customer Service & Care
- ♦ Financial Research

### Technical Expertise

- ♦ **Microsoft Office (Word, Excel, PowerPoint, Access, PowerPoint, Outlook) as well as Visual Basic for Applications and Financial Modeling** ♦

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### Education & Training

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**Master of Business Administration (MBA), Finance and Management**, Long Island University, C.W. Post College of Management; *Cumulative GPA: 3.7/4.0*

**Bachelor of Science, Finance and Management**, State University of New York at Old Westbury; *Cumulative GPA: 3.2/4.0*

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### Relevant Internships

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**Subalternate Inc.**, Forest Hills, NY

**Start-Up Long/Short Equity Hedge Fund**

- **Portfolio Management:** Collaborated in the design and development of a long/short portfolio construction optimization process
- **Risk Management:** Advised on strategic development and provided guidance on issues pertaining to risk management
- **Investment Analysis:** Analyzed hedge instrument options and probable tradeoffs through selection process
- **Data Analysis:** Coordinated data queries creation and management working with application development personnel
- **Quantitative Analysis:** Administered feedback on use of alternative financial software for proficient quantitative analysis

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## Professional Experience

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**Nassau Financial Federal Credit Union**, East Meadow, NY

2012-Present

### Assistant Senior Teller

Service 200 member transactions accurately according to company, state and federal policies and procedures; greet each customer with a smile and educated them on company products and services.

- **Sales Goals Achievements:** Attained and surpass monthly sales goals of 16 referrals as set by the credit union
- **Professional Development:** Working knowledge of products and services the credit union offers, continually educate and keep abreast of all policies, procedures and products in order to represent the company's brand and insure a heightened customer experience
- **Top-Notch Customer Service:** Address customer questions and concerns and referred to appropriate resources to achieve customer satisfaction
- **Personnel Management:** Supervised and trained 3 new employees on transaction procedures and customer relations

**Capital One Bank**, Merrick, NY

2008-2012

### Senior Teller II

Oversaw the processing of customer financial transactions within assigned limits and established guidelines

- **Career Development:** Kept abreast of company policies and procedures, attended professional development meetings and seminars and remained highly educated about all company's products and services in order to provide maximum customer assistance
- **Product Sales:** Met sales and referral goals by identifying and selling products beneficial to the customers' needs
- **Customer and Client Satisfaction:** Addressed customer questions and concerns and referred to appropriate resources to achieve customer satisfaction
- **Employee Training:** Oversaw the training and development of two new employees on transaction procedures, sales referrals, and customer service

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## Professional Affiliations

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◆ New York Society of Security Analysts, Society of Quantitative Analysts ◆ International Association of Financial Engineers ◆ American Finance Association ◆ Financial Management Association LIU Post Chapter ◆