

Jordon Luo

Seeking growth in the financial industry while making genuine connections.

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EXPERIENCE

JPMorgan Chase, N.A., Relationship Banker

Nov. 2020 - PRESENT

Develop a deep relationship with clients. Recommend suitable products to clients, primarily in Cantonese. Provide account services for personal and business accounts, loans, investments, and trusts. Have a thorough understanding of industry regulation and state laws.

Chase Bank, Associate Banker

Mar. 2019 - Nov. 2020

Provide account services to clients, primarily in Cantonese, eg. deposits, withdrawals, payments, change of address, etc. Perform audits on cashboxes, ATMs, Vaults and maintain scrutiny on branch cash levels.

Starbucks, Barista/Supervisor

July 2015 - June 2019

Keep a clean storefront while making coffee and pastries for customers. Delegate 10-15 baristas in a high traffic environment while maintaining FDA/OSHA standards. Coach new baristas/supervisors. Secure Large cash deposits, par registers, and make store orders for food and cleaning products.

EDUCATION

San Francisco State University, Undergraduate Degree

2022 - 2024

My cumulative GPA is 3.5. Received my Bachelors of Arts in Economics.

VOLUNTEERING

George Washington High School — ESL Tutor

Aug. 2017 - May 2018

Help students with writing/oral communication and assignments. Provide a sense of belonging whilst creating a nonjudgmental environment.

SKILLS

Reliable, flexible, and open to criticism.

Leadership, sales, and punctuality.

LICENSES & CERTIFICATIONS

Life-Only Agent, issued by California Department of Insurance

Series 63, issued by NASAA

Series 6, issued by FINRA

S.I.E., issued by FINRA

LANGUAGES

English and Cantonese

