

## WORK EXPERIENCE

### Financial Planner

Rockville Bank

02/2003 – 12/2012

Rockville, MD

#### Achievements

- Developed strategic seasonal and annual sales, margin, and turn plans in line with the company's overall business strategy.
- Provided an effective tailor-made financial plan to support the company's growth initiatives and financial goals.

## EDUCATION

### B.A in Banking and Finance

Chicago State University

08/1999 – 06/2003

GPA: 3.9

#### Relevant Modules:

- Principles of Accounting
- Financial Management
- Consumer Finance
- Risk Analysis
- Banking Fundamentals
- Bank Lending

## AWARDS

### BD Insurance Awards (2018)

Bank of Maryland

### Financial Planner of the Year (2016)

M&D Bank

## ORGANIZATIONS

### CFA Society Maryland (2016 – Present)

M&D Bank

### Financial Analyst Association of Maryland (2009 – Present)

Member

## VOLUNTEER EXPERIENCE

### Co-Founder

The Good Samaritan's Purse

03/2013 – Present

### Chairman of the Board

Junior Achievement Maryland Foundation

04/2013 – 06/2017

## LANGUAGES

### English

Native or Bilingual Proficiency

### Mandarin

Native or Bilingual Proficiency

### German

Limited Working Proficiency

### French

Limited Working Proficiency

## INTERESTS

Sustainable Investment

Cryptocurrency

History of Economics

Esports

Marathon Running