

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 | - Consumer Finance | - Banking Fundamentals |
| - Financial Management | - Risk Analysis | - 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	Mandarin	German	French
Native or Bilingual Proficiency	Native or Bilingual Proficiency	Limited Working Proficiency	Limited Working Proficiency

INTERESTS

- Sustainable Investment
- Cryptocurrency
- History of Economics
- Esports
- Marathon Running