Jayden Chan

Financial & Investment Planner

Analytical, results-oriented professional with 20+ years of experience in providing financial planning services to a wide range of clients, outlining investment insights, potential risks, and delivering market intelligence in line with the current trends. Proven expertise in the finance and investment industry with an in-depth understanding of investment banking practices, financial products, risk mitigation, and compliance regulations.

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AREAS OF EXPERTISE

GAAP | Tax Audit & Returns | Business Operations | Internal Controls | Risk Management & Compliance | Financial Accounting | Asset Management | Financial Planning & Analysis | General Account Ledger | Wealth Management | Negotiation | Public Speaking | Teamwork | Excellent Communicator

WORK EXPERIENCE

Accounting Manager
Bank of Maryland

08/2016 – Present — *Denver, CO*

Achievements/Tasks

- Oversee the daily operations of the accounting department including accounts payable/receivable and general ledger.
- Monitor and analyze accounting data to ensure compliance with generally accepted accounting principles (GAAP).
- Establish and enforce internal controls to safeguard the company assets, guarantee financial statement reliability, promote operational efficiency, and encourage adherence with the management's directives.
- Head payroll for 200+ employees, ensuring that paychecks are correct and delivered on time.
- Generate accurate, reliable financial statements that complied with the company's established guidelines.

Financial Planner
M&D Bank

12/2013 – 08/2016 — *Rockville, MD*

Achievements

- Provided an appropriate financial plan to clients by assessing their overall financial status and understanding their needs.
- Studied market trends and produced risk assessment documentation for management – contributing in $2,430,000 savings for our clients.
- Developed an effective strategy to generate new business and build relationships through networking and marketing.
- Connect clients with the relevant department, branch, or advisor to help them meet their financial needs and goals.

Investment Retirement Planner
RMD Wealth Management

12/2012 – 12/2013 — *Rockville, MD*

Achievements

- Assessed the clients' current financial situation to determine their needs and goals for their retirement years.
- Established and maintained a strong relationship with clients by helping them to stay on track for a financially stable retirement.
- Performed analysis of the client's financial history, identify areas for improvement and provided recommendations.