

Brandon Woolfolk

Hurst, Texas, 76054 | 817-538-0849 | BrandonWoolfolk03@outlook.com

[LinkedIn Profile](#)

OBJECTIVE

Motivated and client-focused recent graduate with a B.S. in Business Administration, seeking to apply analytical skills, customer service experience, and a passion for financial services. Eager to learn about securities, equity, options, and mutual fund transactions, while supporting client relationships with adaptability and dedication.

EXPERIENCE**Keller Williams DFW Preferred, Coppell, TX**

Research & Documentation Analyst

June – August 2024

- Conducted in-depth market and system research to ensure regulatory adherence and improve operational procedures.
 - Collaborated with leadership to refine the Retention System, enhancing client relationships and employee engagement.
 - Created and updated SOPs for intake, offboarding, and recruitment, ensuring seamless workflows.
 - Developed a comprehensive transition plan for Mega Agents, improving system-wide efficiency.
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ACADEMIC PROJECTS**Ariosa Financial Research, Capstone Senior Project**

- Conducted detailed market research for a start-up client in the telehealth industry, presenting insights that increased their client base by 35%.

Evergrande Case Study, Strategic Management

- Analyzed the effects of China's regulatory policies on Evergrande's collapse, exploring the role of financial ratios and market conditions.
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EDUCATION

Triple Ten Bootcamp

Business Intelligence Analytics

March 2024

- Learned and applied tools: Google Sheets, Tableau, Power BI, SQL, and PostgreSQL
 - Developed skills in data visualization, business intelligence reporting, and database management
 - Gained experience analyzing complex datasets to provide actionable insights
 - Completed hands-on projects, including creating dashboards and writing optimized SQL queries
 - Acquired knowledge of data-driven decision-making and problem-solving strategies
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University of Texas at Dallas

Bachelor of Science, Business Administration, Cum Laude

August 2024

GPA: 3.7

Relevant Coursework: Financial Markets, Business Finance, Strategic Management, Project Management

ADDITIONAL SKILLS

- **Client Relationship Management:** Proven ability to engage clients, resolve issues, and provide exceptional service.
 - **Adaptability:** Flexible and willing to work various shifts, including overnight and weekends.
 - **Technical Skills:** Microsoft Excel, Visio, Project, Teams, Tableau, SQL, Lucidchart.
 - **Communication & Collaboration:** Strong verbal and written communication skills; able to navigate multiple computer systems and applications effectively.
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Eligibility

- US Citizen, eligible to work full-time with no restrictions.