

CAIRO DEGAILLARD

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OBJECTIVE

Highly motivated and goal-driven individual skilled in collecting, monitoring, and analyzing sales data and developing reports to illustrate findings. Experienced in qualitative and quantitative analysis and forecasting. Tech-savvy in the use of spreadsheets and financial management software.

Willing and able to apply perseverance and dedication to meet team and corporate goals.

SKILLS

Financial modeling:

Stata - Statistical language

CRM:

SmartOffice by Ebix

Office 365:

SharePoint

OneDrive

Outlook

Word

Excel

PowerPoint

Publisher

Access

Google Suite:

Drive

Gmail

Calendar

Video editing:

Adobe Premiere Pro

VideoPad

Graphic design:

Adobe Spark

Canva

Posting and advertising:

Facebook

Instagram

YouTube

Pinterest

Twitter

PROFESSIONAL EXPERIENCE

Cetera Investors (formerly Foresters Financial)

Registered Sales Assistant - June 2017 to September 2019
San Antonio, TX

- Performed wide range of administrative tasks with little supervision on behalf of Assistant Manager, lead of training and internship programs.
- Streamlined operations and prioritized tasks, allowing senior staff to increase revenue by 36% and sales production by 64%.
- Implemented use of business intelligence software to continually develop spreadsheets to track, analyze and report on performance and sales data.
- Managed administrative logistics of events planning, including contract signing, fee collection, event booking and event promotions.
- Used SmartOffice CRM to maintain company database with essential account and sales information for over 20,000 clients, prospects, and leads.
- Prepared presentations, materials and documentation for use by Assistant Manager in meetings and engagements.
- Coordinated client, office and regulatory paperwork.
- Processed payments, transfers, and trades, and handled expense reporting.

Financial Services Representative - June 2016 to June 2017
San Antonio, TX

- Built and deepened productive relationships with prospective and competitive customers to drive sustained growth.
- Worked with clients to develop financial planning strategies and solutions through evaluation of finances.
- Planned over 30 financial wellness events to strengthen brand initiatives and maximize outreach.
- Monitored weekly sales to write reports for senior leadership and streamline operational processes.

Trinity University Office of Student Involvement

Student Activity Mentor - August 2013 to May 2015
San Antonio, TX

- Collaborated on program operations with Assistant Director of Student Involvement and Coordinator for Diversity and Inclusion, including offering feedback from participants and improvement recommendations.
- Managed monthly Student Leader Spotlight Award program including promotion, documentation, interviews, video editing and posting.
- Worked with student organizations to understand requirements and provide exceptional service.
- Devoted special emphasis to punctuality and worked to maintain outstanding attendance record, consistently arriving to work ready to start immediately.

OTHER EXPERIENCE

Virtual Social Media & Community Management Intern

So Love Autistic Center. Remote. August 2015 to December 2015.

Student Assistant

Trinity University Mail Center. San Antonio, TX. August 2012 to May 2015.

Sales Associate

Old Navy, Inc. Baytown, TX. June 2013 to August 2013.

EDUCATION & LICENSES

Trinity University

Bachelor of Science, May 2019

- Major in Mathematical Finance
- Minor in Business Administration

Texas Insurance License

Life, Accident, Health and HMO, June 2016

FINRA Exams

Series 6, Investment Company and Variable Contracts, June 2016

Series 63, Uniform Securities Agent State Law, July 2016