

# Enzo S Jerez

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A passionate professional who enjoys increasing knowledge of data analytics to help companies make better business decisions.

## EXPERIENCE

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### Investment Specialist Assistant

November 2021 – June 2022

Spach & Associates- Ameriprise Financial Services | Los Angeles, CA

As part of Ameriprise Financial, the #1 most trusted Wealth Management according to *Investor's Business Daily*. The purpose of the wealth management firm is not just work with money, but to aid clients with their financial goals. By creating personalized financial advice, Spach & Associates not only guides the 500+ clients for tomorrow's goals, but also supports clients for today's challenges.

#### Key Accomplishments:

- Created proposals & placed trades for portfolios with values up to a million-dollars or more to help accommodate for today's challenges, but still make progress towards the investor's goals.
- Updated/streamlined daily reports, saving company time, to monitor the status of the multiple strategies' positions and created/maintained spreadsheets through Excel to track client data.

### Data Analytics Intern

May 2021 – October 2021

StockShield | Los Angeles, CA

A SEC-registered broker-dealer that uses two patented risk management capabilities created by the company to focus on investment portfolio risk management, one involving government bonds to reduce potential losses and the ladder protecting against the inherent risks of deferred compensation. Allowing investors to feel secure about their portfolios retaining its value.

#### Key Accomplishments:

- Tested hypotheses through back testing by identifying, collecting, and investigating by web scraping the S&P 500 companies' total shareholder returns within the past five years using Excel.
- Created narratives through gathering and analyzing data in order to sell the company's products to investors.

### Head Instructor- 3rd Dan Black Belt

March 2018 – July 2021

Victory Tae Kwon Do USA | Hacienda Heights, CA

One of the top Tae Kwon Do studios in the nation, teaching students' quality martial arts for self-growth and future success in their everyday life. Victory Tae Kwon Do USA is dedicated to training athletes that represent countries such as Mexico and the United States of America year-round, with successful medal placements in international tournaments such as the Pan American games.

#### Key Accomplishments:

- Raised the number of active students alongside my co-workers to 300 by developing and testing new training/coaching methods.
- Signed customers to membership subscriptions by negotiating contracts and giving them the best deal possible with payments ranging from \$480 to \$1,260.

## EDUCATION/CERTIFICATIONS

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Whittier College | Bachelor of Arts in Physics

August 2020

- *Computer Science*
- *Probability and Statistics*

Harvard Business School | Certificate in Business Analytics

December 2021

FINRA | SIE Certified

March 2022

## SKILLS

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Python | SQL | Tableau | Microsoft Suite | Spanish | Windows | iOS | SOLIDWORKS | CRM