

Enzo S Jerez

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A passionate data analyst with a finance background and excellent internship experience. Who is excited to assist in creating business solutions and leave a lasting impact at any company.

EXPERIENCE

Investment Specialist Assistant

November 2021 – June 2022

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

The #1 most trusted Wealth Management company according to *Investor's Business Daily*.

Key Accomplishments:

- Created personalized financial trade advice for the 300+ clients using tools such as Excel, ThomsonOne, Blackrock, and CRM.
- Created on average 20 proposals weekly & placed trades after approval was given 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 that were used by 8 members of the team. Some reports that were streamlined to save 8-hours of company time.

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.

Key Accomplishments:

- Tested hypotheses through back testing by identifying, collecting, and investigating the total shareholder returns(TSR) within the past 5 years by web scraping each of the 500 companies that belong to the S&P 500 list.
- Created narratives for the entire company, 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 10 Tae Kwon Do studios in the nation, teaching students' quality martial arts for self-growth and future success in their everyday life.

Key Accomplishments:

- Trained 3 athletes that represented respective 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.
- 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

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

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