

Contact

Phone

123-456-7890

Email

mig.romero10@outlook.com

Personal Site

<https://migromero10.github.io/cv/>

Education

2019

Accounting BS & Economics BA

SUNY Oswego

2021

Certified Futures & Options Analyst

TrendUp Now Program

2022

Full Stack Developer Bootcamp

The App Brewery

Expertise

- HTML
- CSS, Bootstrap
- JavaScript, jQuery
- Git, GitHub and Version Control
- Node, Express, APIs

Other

Bilingual: English & Spanish

CRPS & CFOA Designations

SIE, Series 7 & Series 63

Miguel Romero

Experience

2021 -Present

Robinhood 1 Orlando, Florida

CXR (Options & Margin Support)

- Exponentially grow my financial services expertise as I develop deep subject mastery of complex financial concepts like equities trading, margin, and options trading

Customer Experience Rep (CXR)

- Constantly deliver an outstanding customer experience through email, chat and phone channels
- Drive continuous improvement to delight customers by acting as the voice of the customer in communicating better ways for us to Democratize Finance for All

2020 - 2021

Mutual of America | New York, NY

Sales Support Representative

- Handled inbound enrollment, asset allocation and rollover calls
- Provided support to the Participant Account Representatives and service department by undertaking group education meetings and client visits on their behalf
- Closed over 40 opportunities year to date (2021), these amount closely to one million in rolled assets

2019 - 2020

Northwestern Mutual | New York, NY

Financial Representative

- Presented customized financial solutions tailored to the client's situation through a needs-based analysis
- Collaborated with Northwestern's planning team to effectively implement the recommended solutions
- Developed client leads using referrals, cold calling, and leveraging network platforms such as LinkedIn

Unpaid Experience

Materials Sector Leader

SUNY Oswego Investment Club

- Consulted with a research team in estimating new stocks to add to a portfolio of over \$300,000

Finance Director

Zeta Beta Tau Fraternity

- Directed a \$46,850 yearly budget while developing projections for the inflow and outflow of income