

MOUSTAFA MOUSSA

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PROFESSIONAL PROFILE

Results-focused financial professional with strength in Sales & Marketing, looking to transition to a marketing role within the financial services industry. A highly motivated critical thinker with strengths in communication, collaboration and project planning. Detail oriented with proficiency in marketing analytics and tools. Adept at managing concurrent objectives to promote efficiency and influence positive outcomes. Eager to contribute and grow in the field of marketing for a dynamic company.

EXPERIENCE

Northwestern Mutual – New York, NY Sept 2020 – Present
Financial Advisor

- Full client servicing & management: comprehensive financial planning including risk management, investment management, estate planning, wealth preservation & distribution, financial modeling and investment & insurance proposals.
- Successfully managed 100+ client relationships with a net worth of up to \$7 million USD each.
- Built exceptional prospecting skills and found new ways to develop my client base outside of traditional outbound calls by developing a highly personalized approach, focusing on community networking, face to face meetings, onsite visits and hyper targeted email & social media marketing campaigns.

JP Morgan Chase – New York, NY Dec 2018 – Dec 2019
Relationship Banker

- Managed a book of business with over \$350 million in assets under management (AUM).
- Identified and acquired high net worth clients of at least \$250k in liquid assets through daily branch interactions.
- Managed these relationships to capture the biggest share of wallet to ultimately become their primary financial institution.
- Partnered with Chase Private Client, JPMorgan security advisors, Mortgage, Business Banking, and Merchant Services to target client's financial issues with customized solutions.
- Offered specialized products including deposit accounts, lines of credit and convenience items based on the specific needs of a customer.

Managing Director / Property Manager – New York, NY Sept 2014 – Apr 2020
Maven Images

- Managed and oversaw reservations, operations, maintenance, administration, and improvement of 8 property rentals.
- Integrated each listing on different platforms using hotel management software to ensure a wide range of reach while avoiding double booking.
- Exceeded over 300 5-star reviews from a diverse group of people from around the world and achieved super host status.

EDUCATION

Columbia University – New York, NY Currently Enrolled
FinTech Bootcamp

Fordham University – New York, NY May 2017
Master of Studies in Law (MSL)

German University – Cairo, Egypt May 2011
Bachelor of Science: Strategic Management and Innovation Technology

SKILLS & LEADERSHIP

- Life & Health Insurance License, Disability and Health Insurance License, Series 6, Series 63 and Securities Industry Essentials (SIE).
- Proficiency in MS Office (Excel, Word, Outlook & PowerPoint), Python, Pyviz, SQL, APIs and hotel management software, Guesty.
- Sales & Marketing, Persuasive Negotiator, Team Player, Strong Communication Skills and Customer Satisfaction & Retention.
- Volunteer: Pro Bono Summer Volunteer Program working with asylum and refugee cases with the Laura Leibfried Law Firm.
- Volunteer: Produced and hosted charity events, fundraisers and clothing drives raising over \$30,000 in donations over the last 3 years for the United Nations Relief and Works Agency (UNRWA).