

# Cole Johnson

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## PROFESSIONAL SUMMARY

Financial professional and software development graduate student with strengths in client relationship management, financial data analysis, and process automation. Experienced in paraplanning and fintech tools (Schwab, Envestnet, Emoney) with developing expertise in programming (Python, Java, JavaScript, SQL) and data-driven solutions for business efficiency.

Seeking roles at the intersection of finance and technology where I can apply analytical, programming, and client-service expertise.

## EXPERIENCE

### Member Relationship Representative All One Credit Union- Worcester, MA September 2025 - Present

- Manage transactions for clients and their accounts
- Process and upload documents.
- Use our personal software for record keeping and transactions.
- Communicate clearly with members and instruct them on what we can do for them.
- Clearly record any opportunities from client interactions.

### Paraplanner

*Finivi Financial Advisors – Westborough, MA*  
June 2022 – September 2025

- Managed daily client outreach for account reviews and financial advice.
- Processed and reconciled client transactions; ensured 100% data accuracy.
- Used Schwab, Fidelity, Envestnet, and Emoney to generate projections and reports.
- Delivered presentations on account strategies, improving client satisfaction and compliance.

## SKILLS

- Financial Planning & Analysis
- Microsoft Excel
- Retirement Planning
- Data Presentation & Visualization
- Familiarity with Schwab, Fidelity, Emoney, and Envestnet
- Programming in Java, JavaScript, Python, SQL, HTML, and CSS.
- Cash Handling
- Customer Service

## LANGUAGES

- *English (Fluent)*
- *French (Proficient)*

## Licenses

- Series 65

**Cashier**

*Market Basket – Leominster, MA*

**May 2016 – May 2020**

- Handled over \$5,000/day in transactions with zero shrinkage.
- Processed customer payments, returns, and complaints in a fast-paced environment.
- Awarded “Customer Service Excellence” for effective problem solving.

**Mail Sorter**

*UMass Lowell – Lowell, MA*

**September 2019 – May 2020**

- Sorted and managed distribution of over 2,000 packages weekly.
- Identified and resolved mail discrepancies, improving delivery accuracy.

**Education**

**Boston University – *Master’s in Software Development***

**January 2025 – Present**

Course work emphasizing databases, Artificial Intelligence, programming (Java, Python, SQL, JavaScript), and applied analytical skills.

**University of Massachusetts Amherst – *Bachelor of Arts in Economics***

**August 2021 – September 2022**

Graduated early; coursework in financial markets, statistics, and monetary economics.

**Lunenburg High School – Lunenburg, MA**

**August 2016 – May 2019**

High GPA; Track Team Captain in senior year.