

JESSE DEFFLER

South Plainfield, NJ 07080
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EDUCATION

05/2017

Bachelor of Arts: Finance

Muhlenberg College - Allentown, PA

- Minors: Business & Mathematics
- Dean's List Fall 2015, Spring 2016, Fall 2016, Spring 2017
- 3.4 GPA

CERTIFICATIONS

- FINRA Series 7 License
- NASAA Series 66 License
- New Jersey Life, Accident & Health Producer

WORK HISTORY

02/2018 to Current

Financial Consultant

Equitable Advisors – Edison, New Jersey

- Provide financial planning and support to clients and determine strategies that meet their financial goals
- Accrued over \$2.5 million in new assets annually, becoming top developing producer on team
- Consistently meet with clients' to maintain current assets and determine whether life or financial changes indicate need for plan revision
- Prospect new clients and set follow up meetings while establishing strong client-advisor relationships
- Recruit, interview, and on board new hires

04/2016 to 05/2017

Data Mining Intern

PPL Corporation – Allentown, PA

- Slashed employee turnover by 20% by identifying bottlenecks in on-boarding process
- Conducted surveys, ran staffing and diversity reports
- Gathered and worked with large data sets to inform executives on company's present state
- Assisted in building new IT database

05/2015 to 05/2016

Accounts Payable Secretary

BioEarth Construction – Kearny, New Jersey

- Worked closely with office employees to process invoices and distribute checks in a timely manner
- Prepared work bids for various company jobs

SKILLS

- Proficient in Microsoft Word, Excel, PowerPoint
- Retirement Planning
- Education Planning
- Investment Advice

STUDENT INVOLVEMENT

Hype Program - Allentown, Pennsylvania

- Volunteered with underprivileged youth on a weekly basis

Athletics

- Competed in Track & Field at a collegiate Division III Level, 3 sport captain in High School