Jesse Deffler

South Plainfield, NJ, 07080, US • jddeffler@gmail.com • 908- 616-8680 • linkedin.com/in/jesse-deffler-990441113

Financial Analyst Profile

*Performance-driven and analytical professional with hands-on experience in collecting information, performing research, and analyzing assets.*

— Key Qualifications —

* Well-developed ability to track a company's financial performance against plan. Capable of providing recommendations to reduce costs and improve financial performance. Expertise in reconciling transactions by comparing and correcting data.
* Adept at developing and maintaining relationships with key stakeholders and delivering outstanding services to clients. Excellent communicator dedicated to the highest standards of integrity and professionalism.
* Highly reliable and detail-oriented professional with a sense of diligence and aptitude to effectively multi-task assignments with stringent deadlines.
* Articulate communicator, able to build strong relations with team members, clients, management, and other stakeholders. Proficient in Microsoft Office Suite (Word, Excel, PowerPoint).

Professional Experience

Equitable Advisors - Edison, New Jersey

**Financial Consultant,** 2/2018 to Present

Provide expert-level of financial advice to clients and define strategies, aligning with their set objectives. Manage recruitment activities, including hiring, training, and employee development. Uncover new revenue opportunities by prospecting new clients and establishing client-advisor relationships.

*Selected Contributions:*

* Increased $2.5M in new assets annually through accurate identification of customer needs.
* Consistently met or exceeded clients’ expectations through strategic planning and execution.

PPL Corporation – Allentown, PA

**Data Mining Intern,** 4/2016 to 5/2017

Delivered hands-on assistance in developing a new IT database to streamline daily workflow. Gathered large data sets, conducted surveys, and directed staffing. Enabled the decision-making process by formulating and presenting diversity reports to top management.

*Selected Contributions:*

* Reduced employee turnover by 20% by identifying bottlenecks in the on-boarding process
* Spearheaded development of a contingency plan to tackle with unexpected situations. Set deadlines, delegated tasks, and oversaw recruitment activities.

BioEarth Construction – Kearny, NJ

**Accounts Payable Secretary,** 5/2015 to 5/2016

Maintained effective co-ordination with office employees to process invoices and distribute checks. Spearheaded the development of work bids for various company jobs.

*Selected Contribution:*

* Planned, designed, and developed bids for $5M+ jobs. Supported in pricing the labor and supplies needed as well as winning the bids and taking jobs.

Student Involvement:

Hype Program - Allentown, Pennsylvania

Athletics

Educational Background

**Bachelor of Arts: Finance**

Minors: Business & Mathematics

Dean's List Fall 2015, spring 2016, fall 2016, spring 2017

3.4 GPA

Muhlenberg College - Allentown, PA

**Certifications**

New Jersey Life, Accident, & Health Producer

**Licenses**

FINRA Series 7 License

NASAA Series 66 License