

Professional Summary

Results-driven Asset Management Specialist with 8+ years of experience in the financial industry, seeking a challenging role in a fast-paced customer environment. Proven ability to develop strong relationships with external database consultants and excel in multitasking, with a deep understanding of financial concepts.

Professional Experience

Senior Asset Management Consultant (CO09)

Inazuma.co | January 2020 - Present

Asset Management Specialist

Finverge Inc. | June 2018 - December 2019

Key Achievements:

- Improved asset allocation efficiency by 25% through data-driven insights.
- Developed and maintained strong relationships with 5+ external database consultants, enhancing project delivery timelines by 30%.

Responsibilities:

- Analyzed financial data to inform asset management decisions.
- Collaborated with internal teams to implement asset management strategies.

Junior Asset Management Analyst

Pinnacle Wealth Management | March 2015 - May 2018

Key Achievements:

- Assisted in the development of a new asset management product, resulting in a 15% increase in client acquisitions.
- Enhanced data reporting processes, reducing errors by 40%.

Responsibilities:

- Supported senior analysts in data analysis and reporting.
- Contributed to the development of asset management strategies.

Financial Analyst Intern

Nova Financial Services | Summer 2014

Key Achievements:

- Created a comprehensive financial model for a client, praised for its accuracy and detail.

Responsibilities:

- Assisted in financial data analysis and reporting.
- Supported the development of financial models.

Education

Master of Science in Finance

University of Michigan - Ann Arbor | May 2015

Relevant Coursework:

- Financial Management
- Investments
- Financial Markets and Institutions

Technical Skills

Financial Analysis:

- Financial Modeling
- Data Analysis
- Portfolio Management

Software Proficiency:

- Microsoft Office Suite
- Tableau
- SQL

Database Management:

- Database Design
- Data Mining
- Database Security

Soft Skills:

- Leadership
- Team Collaboration
- Communication