**JONATHAN BARSZCZ**

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(413) 537-1483

[Jonbarszcz@yahoo.com](mailto:Jonbarszcz@yahoo.com)

**PROFESSIONAL PROFILE:**

Results oriented professional with over one and a half years of relevant work experience in the financial/insurance industry. Highly skilled in effectively collaborating with all members of the organization to achieve business objectives. Strong problem solving, communication and teambuilding skills. Advanced analytical and research abilities.

**EDUCATION:**

University of Massachusetts Dartmouth Graduated: June 2010

Bachelor of Science – Finance

Dean’s List Honoree

**LICENSES:**

* Series 63 License

**PROFESSIONAL EXPERIENCE:**

***Deductible Tracking Unit Analyst, Temporary*** March 2011-Present

Chubb & Son, a division of Federal Insurance Company, Simsbury, CT

* Monitor and update deductibles for D&O and EPL claims currently in litigation.
* Administer all billing correspondence accurately and on a timely basis.
* Prepare spreadsheets and ensure accurate fund balances for each account.
* Maintain consistent communication with auditors, claim examiners and external clientele.
* Research and resolve deductible issues.
* Display dedication to long-term temporary assignment via Stuart Staffing Solutions.

***Registered Representative*** June 2010- September 2010

First Investors Corporation, Agawam, MA

* Targeted potential and existing clients in order to assess their financial goals.
* Analyzed clients’ financial status and recommended solutions based on individual need.
* Maintained a weekly schedule of client appointments and company obligations.
* Prepared presentations to provide information about the products.

***Finance Intern*** June 2009-August 2009

Merrill Lynch, Hyannis, MA

* Created spreadsheets highlighting client portfolio returns.
* Initiated phone calls to various businesses relating to Merrill Lynch’s 401K plan.
* Developed a hypothetical portfolio containing only equities.
* Researched and closely monitored market conditions.

**ACTIVITIES:**

Varsity Football, University of Massachusetts Dartmouth 2006 - 2008