

William Jeong

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Hardworking financial planning graduate with internship experience providing outstanding customer service to small businesses and individuals. Advanced mathematical ability with a talent for making sound financial recommendations through rigorous statistical analysis. Excellent attention to detail and able to work collaboratively and independently.

Education

Bachelor of Science in Financial Planning

Southern New Hampshire University, Manchester, NH
September 2017-June 2021

Coursework completed:

- Wealth Management
- Financial Statements and Reporting Analysis
- Applied Statistics

Key Skills

- Data analysis
- Customer service
- Microsoft Office Suite
- Financial reporting
- Strategic planning
- Mathematical reasoning

Certifications

- ♦ Certified Financial Planner, CPF Board June 2021

Professional Experience

Accounting and Finance Intern

WayUp, Manchester, NH | May 2021 - Present

- Generate financial recommendations based on robust data analysis, receiving praise 4x from assessors for strategic planning and strong mathematical reasoning
- Create and update financial spreadsheets and reports with 99.9% accuracy
- Assist with producing budgets and financial projections for small businesses and individuals
- Contribute to fact-finding and progress meetings with clients and respond to telephone and email inquiries, receiving 98% positive feedback for customer interactions

Customer Service Specialist

Rick's Sporting Goods, Manchester, NH | July 2019-May 2021

- Provided support to store personnel to process complicated transactions and generate accurate invoices
- Applied problem-solving skills to mediate in customer disputes, successfully resolving 88% of complaints within two hours
- Presented products engagingly and knowledgeably to build brand loyalty, exceeding sales targets by 43% in 2020
- Vigorously promoted company Loyalty schemes and insurance programs, increasing Customer participation by 22% over 18 months