

WILLIAM JEONG

Financial planning graduate with internship experience providing quality services to individual and small business clients. Perform rigorous data analysis to generate detailed and reliable financial recommendations. Equally effective working independently or on a team. Committed to professional integrity and excellence in all endeavors. Bilingual: Fluent in English and Spanish.

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NH 23456

PROFESSIONAL EXPERIENCE

ACCOUNTING & FINANCE INTERN

Way Up, Manchester, NH
May 2021 to Present

- ◆ Help produce budgets and financial projections for individuals and small businesses
- ◆ Generate detailed, accurate financial suggestions based on robust data analysis
- ◆ Contribute to fact-finding and progress meetings with clients, and respond to phone and email inquiries
- ◆ Achieved 99.9% accuracy on all updates to financial reports and spreadsheets
- ◆ Earned top marks on all four formal assessments for expert math reasoning and client relations
- ◆ Received 98% positive feedback on customer satisfaction surveys

EDUCATION

Bachelor of Science (BS) - Financial Planning

Southern New Hampshire University,
Manchester, NH | June 2021

Intensive coursework on wealth management, applied statistics, and financial statement analysis.

LANGUAGE

- Fluency in Spanish

KEY SKILLS

- ◆ Customer Service & Relationships
- ◆ Data Gathering & Analysis
- ◆ Financial Forecasting & Reporting
- ◆ Mathematical Reasoning
- ◆ Microsoft Office Suite (Word, Excel, Outlook, PowerPoint)