

Andrew Kargol

FINANCIAL ANALYST

CONTACT



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CERTIFICATIONS

CFA Level 1 Candidate (awaiting May, 2021 results)

Accident and Health Insurance

Life Insurance

Personal Lines Insurance

EDUCATION

University of Redlands

2015 - 2019

Major:

B.S. Financial Economics

Extra Circulars:

Cross Country

Track and Field

EXPERIENCE

Insurance Representative

Liberty Mutual Insurance | 08/2019 - present

- Create marketing and prospecting techniques to meet established targets for new business and premium
- Develop complete knowledge of insurance products, systems, business operations, and sales strategy.
- Senior Achievement Summit 2018 (250 interns from across the country selected based on strong performance)
- Drive teams to improve processes, explicate data and yield meaningful metrics.

Financial Advisor Intern

WestPac Wealth Partners | 06/2017 - 08/2017

- Assist employees with contacting clients and scheduling meetings.
- Gained insider knowledge on company financial products including life, health, and disability insurances as well as 401k platforms.
- Implement marketing and prospecting events.

Computer Assistant

University of Redlands | 09/2016 - 04/2019/i>

- Assist students and employees with issues involving computer applications, software, and hardware
- Maintain the computer center and study rooms by setting up appointments as well as coordinating meetings.
- Gained proficiency with basic computer programs including Excel, Word, and Powerpoint

SKILLS

Technical

Income Tax Assistant Software

Cash Flow and Budgeting

Professional

Leadership

Public Speaking

Verbal & Written
Communication

Problem Solving

Customer Service

LEADERSHIP

Mid-Pacific Institute Cross Country Assistant coach

09/2018 - 04/2019

President of Delta-Sigma-Pi Business Fraternity

09/2018 - 04/2019

Analyst for the University of Redlands Investment Fund

09/2018 - 04/2019

