

JOSEPH MARTINEZ

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PERSONAL SUMMARY

Detail-oriented financial services professional with Series 7 and 63 licenses, advanced Excel modeling skills, and client-facing experience at Charles Schwab. Adept at supporting investment operations, account administration, and high-volume client communications. Currently pursuing an MS in Social Data Analytics, enhancing analytical acumen and data reporting capabilities. Eager to contribute to a high-performing, collaborative investment advisory team focused on exceptional client outcomes.

LICENSES & CERTIFICATES

FINRA Licenses

- Series 7 General Securities Representative License.
- Series 63 Uniform Securities Agent License.

EXPERIENCE

Financial Services Associate | Charles Schwab & Co | April 2024 - Present.

- Delivered personalized financial solutions to diverse clients, including career day traders, small business owners, high-net-worth clients, and retirement investors.
- Identified inefficiencies in client communication and workflow processes; developed Excel-based tools and PowerPoint presentations to improve service metrics and internal training.
- Managed account maintenance tasks & supported money movement requests in compliance with regulatory protocols.
- Leveraged internal departments to address client needs, resolve operational issues, and streamline account processes.

AI Writing Specialist (Contract) | Scale AI | January 2024 - April 2024

- Advanced the writing skills, editing, & comprehension of various Large Language Modules (LLMs).
- Assessed limitations & possibilities of LLM capabilities; evaluated responses for safety, bias, & accuracy.

Part-Time Outreach Officer | MakeDeathsCount | September 2023 - May 2024

- Collaborated with leadership to drive strategic messaging and campaign engagement.
- Researched and secured partnerships through proactive outreach.

Humanitarian Immigration Law Paralegal Intern | Lincoln-Goldfinch Law | August 2021 - December 2021

- Analyzed, translated, & interpreted legal documents & organized evidence to build the preliminary cases.
- Conducted geopolitical research on state violence and human rights issues affecting client cases.

Additional Roles: *Au Pair (Various Families, 2019–2023)* | *Student Fellow, Beto O'Rourke Campaign (2018)*

- Developed structured educational and care routines; organized campaign events and canvassing operations.

EDUCATION

The University of Texas at Dallas | Anticipated Graduation December 2027

- MS, Social Data Analytics & Research.
- Relevant Coursework: Quantitative Research Methods, Data Visualization, R Programming, Cost Basis Analysis.

The University of Texas at Austin | Graduated December 2023

- BA, International Relations & Global Studies with Capstone & an Arabic Minor.
- Capstone Project: The Limitations of Digital Art by Diasporas Displaced by Violence.
- Policy Proposal Finalist from the Student Conference on National Affairs (SCONA) at Texas A&M University.
- Study Abroad: Al Akhawayn University at Ifrane, Morocco – Certificate in Arabic Proficiency.

PERSONAL ASSETS, SKILLS, & COMMUNITY INVOLVEMENT

- **Finance & Operations:** Account Management, Trade Support, Retirement Products, Client Reporting.
- **Technical Tools:** Advanced Excel (pivot tables, dashboards, ExcelSim), PowerPoint, RStudio, SQL.
- **Languages:** Intermediate Arabic, Intermediate Spanish.
- **Soft Skills:** Client Relationship Management, Attention to Detail, Cross-Functional Collaboration.