

MARIA BELEN FINDLEY

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INTRODUCTION

As a Finance undergraduate, I bring practical experience with critical financial tools/software such as Excel, Tableau, SQL, Envision, and Emoney, developed through hands-on roles in financial settings. My leadership experience and ability to influence across all organizational levels complement my strong attention to detail and time management skills. With a passion for innovative financial strategies, I am eager to join a dynamic financial team, ready to leverage data-driven insights and strategic thinking to impact global financial strategies and drive meaningful business results.

EDUCATION

Florida Gulf Coast University

Bachelors of Science Finance - Analysis and Management

GPA : 3.60

Fort Myers, FL

Jan 2023 - Expected May 2025

EXPERIENCE

Wells Fargo | Intern Analyst

Charlotte, NC | Jun 2024 - Aug 2024

- Meticulously auditing data for financial reports, delivering precise and actionable insights for client deliverables ensuring ADA compliance.
- Enhancing, editing, and formatting client presentations for comparative analytical tool for optimized performance and clarity.
- Efficiently managing and analyzing data sets, utilizing VBA to enhance the team's productivity and streamline processes.
- Incorporating feedback on ongoing projects and leveraging valuable insights from a series of speaker sessions to enhance performance and outcomes.
- Updating financial metrics for law firms, including staffing, hours and value, standard value of billable hours logged, effective value, inventory, capital, and credit information, as well as the financial glossary.

Wells Fargo | Wealth and Investment Management Intern

Minneapolis, MN | Jun 2023 - Aug 2023

- Engaged in client meetings alongside senior private wealth teams, focusing on investment strategies, diversification, adjustments, gains, losses, and the reasons behind these financial movements. Also, providing support in pre-meeting and post-meeting calls with the team and executives.
- Engaged in a rotational internship, collaborating across multiple teams and financial disciplines.
- Generated and converted 100 financial planning portfolios/presentations for clients using E-money Software.
- Contributed to the integration of new portfolio management tools.
- Developed a concise fraud alert setup guide. The document is now actively utilized by Senior Financial Advisors when supporting clients.

McCann | Translation Specialist Contractor

Remote | Jan 2016 - Present

- Deliver high-quality translations that supported international financial campaigns and projects.
- Manage cross-cultural communications and document accuracy essential for global business transactions.
- Facilitate multinational collaborations, enhancing brand strategies across diverse markets for clients, including Starbucks, Nike, and Nestlé.

The Club at Grandezza | Customer Service Representative

Fort Myers, FL | Dec 2019 - May 2023

- Increased food/beverage sales by 200%.
- Streamlined Canva software processes, yielding significant operational time and cost savings for the club, elevating overall customer satisfaction.

SKILLS

- Leadership, collaborative problem-solver, innovative, business fundamentals, financial analysis, customer satisfaction, organization, adaptability, and resilience.

PROJECTS

Financial Reporting Efficiency Enhancement

- Developed macros leveraging AI tools and VBA to enhance, edit, and format financial presentations for the top 200 law firms in the U.S.
- Developed macros using VBA to manage Excel spreadsheets, control panels, and populate financial reports.
- Improved efficiency and time management for the Senior Legal Specialty Group at Wells Fargo Advisors.

Comprehensive Guide for Configuring Fraud Alerts

- Played a significant role in an online fraud prevention initiative at Wells Fargo Advisors.
- Developed an intuitive, meticulously crafted step-by-step guide for configuring fraud alert settings.
- Adjusted quickly to changing priorities and integrated feedback from Financial Advisors, team members, and their clients.

Step-by-Step Manual for Investment Policy Statements

- Created an efficient PDF guide for converting Investment Policy Statements from Abbot Downing into Wells Fargo Private Bank format.
- Improved the efficiency of portfolio managers and their superiors in handling Investment Policy Statements.

Data-Driven Decision Making: Predictive Analytics and Forecasting Models

- Utilized predictive analytics techniques to analyze four business cases using large provided data sets in Tableau.
- Developed visual dashboards to present insights and findings and utilized forecasting models to predict trends and make data-driven decisions.

PROFESSIONAL BADGES

Financial Modeling Foundations - **National Association of State Boards of Accountancy (NASBA)**

SQL Essential Training - **National Association of State Boards of Accountancy (NASBA)**

Excel: Macros and VBA for Beginners - **LinkedIn Learning**

Finance Fundamentals - **Bloomberg**

Market Concepts - **Bloomberg**

AI Foundations - **IBM**

Fundamentals of Written Communication - **Florida Gulf Coast University**

HONORS & AWARDS

Foundations Of Leadership Certificate 1, 2 and 3 - The National Society Of Leadership And Success - Mar 2024

Greater Fort Myers Women in Business Scholarship - Aug 2023

Omicron Delta Kappa National Leadership Honor Society of the Lutgert College of Business - Mar 2023

Presidential Scholarship of the Florida SouthWestern State College - May 2022

Dean's List Issued by Florida SouthWestern State College - Feb 2021 - Feb 2023

ORGANIZATIONS & VOLUNTEERING

Women in Investment Management of Southwest Florida

CFA Society Naples

The National Society of Leadership and Success