

Jonathan Horst

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San Francisco CA 94114
415.317.2140 (mobile) - JonathanHorst13@Gmail.com

CAREER OBJECTIVE

Highly motivated individual committed to realizing personal and organizational goals through excellence, teamwork, and a drive to do whatever it takes. Strong desire to be of service to and positively affect the lives of others. Continually striving to improve myself and approach every experience as an opportunity for growth.

PROFESSIONAL PROFILE

Extraordinary Organizational Abilities – Highly organized and detail oriented.

Excellent Time-Management Skills – Able to handle multiple tasks at once and prioritize.

Outstanding Interpersonal Communication – Work with a wide variety of individuals in an amiable and professional manner.

Demonstrated Leadership Qualities – Driven to contribute to the success of others through collaboration and coaching.

Very Positive and Optimistic Mindset – Approach every challenge as an opportunity for growth and improvement.

Strong Working Knowledge of IT – Microsoft Office Word, Excel, PowerPoint, etc; as well as various accounting software applications including QuickBooks, ProSystems Fx.

QUALIFICATIONS SUMMARY

2 ½ years experience in financial planning – Built a practice as an entrepreneur; marketing to desired target markets; relating complex financial concepts to clients; interviewing, training, motivating, and collaborating with colleagues; analyzing clients' financial wellness and proposing recommendations to achieve goals.

4 years of public accounting experience – Auditing, bookkeeping, preparing financial statements and reports, payroll, business valuation, benefit plan administration, tax preparation; articulating complex regulations, financial concepts, and laws to clients.

Trustee experience – Served organizations in an executive role and other positions to contribute to community and to be of service to others.

CERTIFICATIONS

- Series 7 & Series 66 Licenses
- Life, Health, Disability, and Long-Term Care Licenses in Colorado

PROFESSIONAL EXPERIENCE

Registered Client Service Associate

Morgan Stanley Smith Barney

01.2012 – 04.2012

San Francisco, California

Pastry Chef

Dalvay by the Sea Resort

05.2011 – 06.2011

Prince Edward Island, Canada

Financial Advisor

Waddell & Reed

07.2008 – 06.2010

Denver, Colorado

Auditor

Bondi & Co LLC

01.2008 – 05.2008

Denver, Colorado

Bookkeeper
Well-Balanced Accounting Inc

07.2007 – 12.2007
Denver, Colorado

Accountant
Zick Business Advisors Inc

05.2006 – 07.2007
Denver, Colorado

Accountant
Terry & Stephenson

01.2006 – 05.2006
Denver, Colorado

Bookkeeper
Well-Balanced Accounting Inc

04.2004 – 01.2006
Denver, Colorado

COMMUNITY SERVICE

Treasurer
Denver Professional Men's Club

11.2009 – 06.2010
Denver, Colorado

Co-Chair
Human Rights Campaign (HRC) Colorado

07.2009 – 06.2010
Denver, Colorado

Treasurer
The Alexander Foundation

10.2009 – 03.2010
Denver, Colorado

Vice-President
Denver Metro Chamber of Commerce Group

09.2009 – 01.2010
Denver, Colorado

Volunteer
Community Sailing of Colorado

04.2005 – 04.2007
Denver, Colorado

Volunteer
Children's Museum of Denver

10.2006 – 11.2006
Denver, Colorado

Treasurer
Beta Alpha Psi

08.2005 – 05.2006
Denver, Colorado

EDUCATION HISTORY

Pastry Arts Certificate
Culinary Institute of Canada

09.2010 – 04.2011
Prince Edward Island, Canada

Bachelors – Triple Major: Finance, Accounting, & German
University of Colorado

01.2000 – 05.2006
Denver, Colorado

LANGUAGES

English (First language) German

INTERESTS & HOBBIES

Yoga, Meditation, Cooking, Tennis, Fencing, Cycling, Hiking, Climbing, Personal Development

REFERENCES

Dave Shimko
Admissions Counselor
Ashford University
866.974.5700 x6680

Mary Jo Houser
Bookkeeper & Owner
Well-Balanced Accounting Inc
303.692.8363

Zach Bouck
District Manager
Waddell & Reed
702.261.5379

Renaldo Phillips
CEO
Vertu Foundation
303.489.5457

George Ira Carroll
Life Coach
Inner Resonant Awareness
303.991.4680

Anna Lovascio-Hansen
Internal Auditor
City & County of Denver
720.913.5064