

Joseph Simko, CFA

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CAREER OBJECTIVE

Software engineer looking to apply 4+ years of problem solving and consulting skills from the field of financial advising. Self-taught developer with experience creating a full stack web application and proficiency with multiple programming languages and frameworks.

SOFTWARE ENGINEERING EXPERIENCE

Personal Projects

Mixed Drink Menu – Full Stack Web Application (mixeddrinkmenu.com)

- Designed and launched an application that solves common issues for households and restaurants (HTML, CSS, JavaScript, React, MongoDB, and MongoDB Realm)
- Developed efficient algorithms that process user selections to generate drink options and recommendations

Certifications: FreeCodeCamp JavaScript Algorithms and Data Structures Certificate

Skills: Python, JavaScript, React.js, HTML, CSS, Node.js, MongoDB, Git, GitHub, full stack development, web development

EDUCATION

Christopher Newport University

Newport News, VA

- B.S. in Business Administration – Finance August 2014 – May 2018
- Honors: Summa Cum Laude (**GPA: 3.95 / 4.0**)
- Relevant coursework: Foundations of Computer Science, Computer Programming I and II, Information Systems, Discrete Structures and Computer Applications, Software Packages and Business Applications

PROFESSIONAL EXPERIENCE

Creative Planning (formerly SBSB)

McLean, VA

Financial Planner

April 2021 – October 2022

- Advised approximately 250 clients on investing, tax, and financial planning strategies with 99% client retention
- Engaged with prospects to communicate and deliver value which led to 30% annual growth in client-base
- Collaborated with clients to build financial projections which were used to develop comprehensive recommendations

Portfolio Analyst

July 2018 – April 2021

- Analyzed client portfolios and provided guidance on appropriate investment decisions
- Consulted with clients to discuss economic outlook and investment strategy
- Enhanced firm processes for constructing investment plans and reviewing concentrated stock positions, leading to a more streamlined workflow

Certifications: Chartered Financial Analyst (CFA) Charterholder