Thanh Hoang

| (425) 647-5255 | thanh.hoang210@gmail.com | LinkedIn |

Self-motivated, and driven professional who brings strong analytical and problem-solving skills to meet complex business situations and deadlines. Looking for opportunities to help clients identify their areas of interest/focus and execute their strategic vision. Eager to engage in external relationships/partnerships building to enable growth and expansion. Passion for helping create solutions when there is lack of a clearly defined scope and absence of complete information.

Education

University of Washington - Bothell, WA Graduated: *June 2020*
Bachelor of Arts in Business Administration - Finance and Management

Experience

Wealth Management Analyst *June 2022 – March 2023*
Crosby Wealth Advisors

- Maintain professional relationships with clients through digital and personal communication leveraging the company's Salesforce platform and informing best practices firmwide
- Performed market analysis to inform long term strategy for advisers at a Barron's and Forbes top financial advisor with over $600 million in AUM
- Provided outstanding customer service to high net-worth individuals with $15+ million in assets while promoting seminars and social events as targeted business development initiatives
- Analyzed historical client return data vs. index fund performance to quantify risk tolerance and appropriately combine of holdings across various asset classes to inform client recommendations
- Assist in providing investment recommendations to optimize and rebalance client portfolios
- Review and take appropriate action on client account alerts and requests
- Input orders at the direction of financial advisors
- Participate in marketing, new business, and client acquisition initiatives

Investor Services Project Manager *May 2021 – July 2021*
Carta

- Collaborate cross-functionally to deliver optimal product and service to client
- Manage upwards of 50 client projects with Asana to meet deadlines, goals, and client expectations
- Perform product analysis on platform products to better enhance the user experience
- Participate in agile projects to increase automation and reduce workload of processes
- Assist in the implementation of an in-app venture fund/SPV set up guide that increased automation by 25%
- Troubleshoot client inquires, criticism, and bugs and resolving them through Jira and Slack
- Manage complex datasets with high integrity and confidentiality
- Work closely with product, engineering, sales/go-to-market, and internal implementations leaders to improve the on-boarding experience for customers

Client Service Specialist and Financial Planning Assistant *June 2019 – April 2021*
Crosby Wealth Advisors

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- Provided outstanding customer service to high net-worth individuals with $15+ million in assets while promoting seminars and social events as targeted business development initiatives
- Analyzed historical client return data vs. index fund performance to quantify risk tolerance and appropriately combine of holdings across various asset classes to inform client recommendations
- Reduced client meeting speed to market by 25% through a streamlined onboarding and due diligence process