Student Name [**studentmba@gmail.com**](mailto:studentmba@gmail.com)

487 Leader Dr. Perkasie, PA 18944 215.xxx.xxxx (cell)

**Objective:** Driven, results oriented financial services professional eager to apply over 8 years of finance and banking experience to career in tax.

**Career Highlights:**

* Consistently ranked in Top 10% on Regional Leverage Reports against 100+ peers with overall goal performance across nearly 20 sales & service categories
* Overall 2007 performance earned multiple company incentives including a sales trip to the Caribbean in 2008

**Key qualifications/ proficient in:**

Client relationship building

Financial Statement Analysis

Debits/Credits

Journal Entries

Trial Balances

Microsoft Word/ Excel/ Power-point

Securities licensed as Series 7 & 66

PA Life, Accident, &Health Insurance

**Experience:**

***Wachovia Bank, a Wells Fargo Company*** *Warminster, PA*

*Financial Specialist 2003-present*

* Acquire new clients & develop existing client relationships, both individual and business
* Analyze & present financial situations & offer deposit, lending, & investment solutions
* Review personal and commercial tax returns and financial statements; reconcile bank accounts
* Mentor and lead new employees & assist in all aspects of leadership with branch operations

***American Express Financial Advisors, now Ameriprise*** *Langhorne, PA*

*Financial Advisor 2001-2003*

* Analyzed financial positions of individual clients & provided financial planning solutions
* Prepared cash flow, asset/liability, revenue/expense forecasts for clients concerned with liquidity, risk, retirement income, and estate planning
* Proposed options and strategies using mortgage, brokerage, banking, and insurance products
* Recommended & established investment portfolios & retirement programs

**Education: *Delaware Valley College***, Doylestown, PA

Master of Business Administration – 2011

**Accounting** concentration, GPA **3.6**

***LaSalle University***, Philadelphia, PA

Bachelor in Business Administration -2001

**Finance** specialization, GPA **3.7**

**Memberships/ Personal Achievements**

* Member of Bux-Mont Landlord Investor Group
* Credit Bureau Score- 780 with Transunion