

NAME

TITLE

000-000-0000 / EMAIL / CITY, STATE, ZIP

Profile

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Experience

Student Loan Advisor - Rscnt Co. / Location

Sept. 2021–Present

- Assisted students in choosing the most suitable loan terms based on their financial situation and credit score
- Advised students on how to apply for the loans they've chosen and how to prepare the requirements
- Instructed over 250 students on managing their personal finances in college years to pay off their debt with no default
- Took part in designing three workshops for students' families to educate them financially
- Informed the students of the recommended action in each step of the loan application process

Financial Advisor Internship - K.W.O Group / Location

June 2020–Aug. 2021

- Assisted financial advisors in preparing their presentations. This included selecting the important data and designing the main highlights
- Helped advisors in their market research and analyzing the economic trends
- Aided the financial team in crafting financial documents like investment reports
- Completed a sales and financial services training program on how to use consultation approaches with clients
- Finished an advisor marketing workshop on the inbound marketing approach to attract clients towards financial services

Project Experience

- Simplified the student loans federal regulations and published them in a user-friendly manual online on Rscnt Co. blog
- Delivered a workshop on budgeting, financial planning, and credit management; in collaboration with a team of three advisors
- Upgraded Rscnt Co.'s students database to be more organized and easy to use. The upgrade also makes transactions simple to manage and keep record of

Education

B.Sc. in Business Administration - Bismarck State College

2014–2019

- GPA: LIST
- AWARD
- AWARD

DEPARTMENT - SCHOOL

May 2009

- GPA: LIST
- AWARD
- AWARD

Skills

Expertise

- Communication
- Customer service
- Problem-solving
- Loan advising software
- Loan products

Licenses & Accreditations

Licenses Licenses & Accreditations

- Certified Student Loan Professional, CSLA Institute, 2020