

NAME

TITLE

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

Profile

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Experience

Financial Analyst - City Financial Group/ Location

MONTH YEAR - Present

- Provided financial guidance to the business department to increase profits by 13%
- Monitored industry trends to advise the most profitable investments
- Analyze debt patterns and moved funds to increase revenue by \$1.1M
- Managed financial statements focusing on cash flow analysis
- Adopted an automation tool that decreased manual inputs by 40%

Financial Analyst - First City Bank/ Location

MONTH YEAR – MONTH YEAR

- Created monthly expense reports to help guide investment approaches
- Met with clients to give insight into interest rate trends and risk management
- Monitored equity investments, valuations, and risk ratings
- Digitized back documents to give a complete scope of the bank's financial tracking
- Transition to a streamlined online database that improved efficiency by 17%

Project Experience

- Serve as volunteer accountant for the Woodland Elementary Parent Teacher Organization

Education

Bachelor's Degree in Financial Analysis - State University

MONTH YEAR

- GPA: LIST
- AWARD
- AWARD

DEPARTMENT - SCHOOL

May 2009

- GPA: LIST
- AWARD
- AWARD

Skills

Expertise

- Analyze tax rates
- Asset management
- Financial analysis report creation
- Managerial accounting
- Risk management

Licenses & Accreditations

Licenses Licenses & Accreditations

- Chartered Financial Analyst (CFA) from the Financial Management Association (FMA)
- Certified Investment Management Analyst (CIMA) from the Institute of Management Accountants