

# NAME

TITLE

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

## Profile

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## Experience

### Student Loan Advisor - Steve Finance/ Location

*Feb. 2020–Present*

- Advised over 200 students a year on the most appropriate student loan for their situation and recommended the most suitable repayment terms
- Helped clients to accomplish a below-national-average loan default rate of 7%
- Guided students through each step of completing their loan application
- Educated students about how to plan and manage their finances to successfully repay the loan with no defaults
- Built a strong network with many student loan stakeholders, including financial aid partners

### Financial Aid Advisor - ABZ University / Location

*Mar. 2018–Jan 2020*

- Guided students through completing the FAFSA application by giving them instruction on how to fill it out accurately and completely
- Advised students on creating a CSS profile with a high acceptance rate. This included recommendations to ensure their profiles meet all the requirements
- Helped students prepare for scholarships and work-study opportunities
- Provided guidance for financially incapable students on how to get a grant
- Achieved a high satisfaction rate of 88% from my students

### Project Experience

- Designed a system for streamlining loans application at Steve Finance. The system allows students to track their application status online and contact an advisor at any point for more help
- Upgraded application system to decrease review time by 32%. The new features offer more insights to the reviewers for faster decision-making
- Developed a loan default prevention program. It consisted of four workshops over four weeks, addressing long-term budget planning to avoid loan default

## Education

### M.Sc. in Finance - Eller College of Management 2019

- GPA: LIST
- AWARD
- AWARD

### B.Sc. in Business Administration - Grand Canyon University 2013–2017

- GPA: LIST
- AWARD
- AWARD

## Skills

### Expertise

- Financial analysis tools
- Loan counseling software
- Customer service
- Problem-solving
- Communication

## Licenses & Accreditations

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- Certified Student Loan Professional, CSLA Institute, 2020