Nylah Wood

College Financial Advisor Intern

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STRENGTHS

Client Focused
Established trust with clients quickly, prioritizing their unique needs during consultation.

Analytical Thinker
Frequently utilize data analysis skills to inform strategic planning processes leading to sound decisions.

Strong Communicator
Communicate complex financial concepts simply, effectively aiding client understanding.

Team Player
Collaborate seamlessly with colleagues to serve clients best, demonstrating adaptability and support.

Independent Learner
Pursue continuous education in finance and planning independently, illustrating dedication to personal growth.

SKILLS

Financial Planning

Client Relationship Management

Market Research

Financial Software Proficiency

Strategic Communication

Data Analysis

Presentation Skills

Time Management

Problem Solving

Attention to Detail

Team Collaboration

Ethical Decision-Making

Organizational Skills

Negotiation Techniques

Regulatory Knowledge

SUMMARY

Eager and driven financial professional with a commitment to developing a successful financial advisory practice. Experienced in client relationship management, strategic planning, and utilizing financial tools effectively. Foster meaningful connections with clients, understanding their needs, and crafting personalized solutions that drive satisfaction. Adept at prospecting new clients while offering support to existing ones. Regularly engage in training to enhance skills and knowledge, positioning for future advancement. A strong track record demonstrates capability in balancing coursework with real-world responsibilities.

EDUCATION

Bachelor's Degree in Finance

University of Illinois | GPA: 3.8 | 2024 | Champaign, IL

Coursework: *Financial Planning, Investment Analysis, Client Management, Market Research*

TECHNICAL SKILLS

- **Financial Analysis Tools:** Excel, QuickBooks, Bloomberg
- **CRM Software:** Salesforce, HubSpot, Zoho
- **Presentation Software:** PowerPoint, Prezi, Canva
- **Research Tools:** FactSet, Morningstar, Yahoo Finance
- **Financial Modeling:** Monte Carlo Simulation, Discounted Cash Flow, Variance Analysis

EXPERIENCE

Financial Planning Associate

Future Wealth Advisors | January 2025 - Present | Chicago, IL

Focused on collaborating with senior advisors to deliver comprehensive financial strategies tailored to client objectives. Involved in preparing detailed presentations and documentation necessary for informed decision-making. Maintained ongoing communication with clients, ensuring accountability throughout the planning process. Leveraged market insights to identify profitable investment opportunities.

- Collaborated closely with senior advisors to deliver personalized financial plans.
- Conducted extensive market research identifying beneficial investment opportunities.
- Prepared detailed presentations and paperwork for clientele, ensuring clarity.
- Cultivated strong client relationships through regular communication and feedback.

Financial Intern

NextGen Financial Group | June 2024 - December 2024 | Chicago, IL

Assisted with client prospecting efforts and arranged consultations to establish initial connections. Supported the development of financial strategies under mentorship, gaining first-hand experience in practical applications of theory. Strengthened skills on various financial software vital for managing client portfolios. Engaged in numerous training sessions aimed at increasing knowledge of financial services.

- Facilitated prospecting efforts to introduce potential clients to advisory services.
- Enhanced financial strategy creation alongside experienced advisors.
- Developed proficiency in financial software utilized for managing client data.
- Participated fervently in trainings focused on expanding financial service knowledge.

LEADERSHIP & AWARDS

- Achieved Dean's List for outstanding academic performance.
- Recognized by professors for excellent contributions to class projects.

LANGUAGES

English — Native

Spanish — Intermediate

MY CAREER

- Financial Planning Associate at Future Wealth Advisors (1.4 Years)
- Financial Intern at NextGen Financial Group (6 Months)

CERTIFICATIONS

- Certified Financial Planner (CFP) 2026
- Investment Foundations Certificate 2025

PROFESSIONAL AFFILIATIONS

- Member of Finance Club, actively participating in events.
- Volunteer at local nonprofit providing financial literacy workshops.

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST