Nylah Wood

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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 2024
University of Illinois GPA: 3.8 *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

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

EXPERIENCE

Financial Planning Associate
January 2025 - Present
Future Wealth Advisors *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
June 2024 - December 2024
NextGen Financial Group *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.

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.

LANGUAGES

- English (Native)
- Spanish (Intermediate)

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST