

# Finley Decker

## College Financial Representative Intern

(217) 555-0123 | finley.decker@example.com | linkedin.com/in/finleydecker | 123 Main St, Springfield, IL 62701

### STRENGTHS

- Effective Networking**  
Consistently seek out connections resulting in valuable client opportunities.
- Client-Centric Focus**  
Ability to put client needs first, thereby fostering lasting relationships.
- Analytical Thinking**  
Regularly analyze situations and provide logical solutions for complex problems.
- Adaptability**  
Thrived while adjusting approaches based on varied client demands or environments.
- Result-Driven Approach**  
Focus predominantly on delivering measurable outcomes through each initiative undertaken.

### SKILLS

- Client Relationship Management
- Financial Planning Software
- Strategic Business Development
- Team Collaboration
- Time Management
- Entrepreneurial Mindset
- Sales Techniques
- Market Analysis
- Problem Solving
- Presentation Skills
- Networking Strategies
- Policy Interpretation
- Business Strategy Execution
- Financial Literacy
- Professional Communication
- Decision Making

### SUMMARY

Ambitious financial professional eager to contribute fresh insights and create lasting client relationships in a learning environment. Currently developing networking skills and cultivating strategies for business growth through hands-on experience with established financial advisors. Keenly focused on understanding clients' needs while applying unique planning software tools for tailored solutions. Continuous participation in training solidifies a solid foundation in financial literacy and effective sales techniques. Committed to nurturing not only personal but also professional growth, aspirations are meant for higher achievements within the industry.

### EDUCATION

#### Bachelor of Science in Finance

University of Illinois 🎓 GPA: 3.7 📅 2023 📍 Champaign, IL

**Coursework:** Financial Markets, Corporate Finance, Investment Analysis, Financial Planning

### TECHNICAL SKILLS

- Financial Planning Software:** QuickBooks, Microsoft Excel, Salesforce
- Communication Platforms:** Zoom, Skype, Microsoft Teams
- Presentation Tools:** PowerPoint, Canva, Prezi
- Data Analysis Software:** Tableau, SPSS, Google Analytics
- CRM Systems:** Salesforce, HubSpot, Zoho
- Project Management Tools:** Trello, Asana, Microsoft Project
- Scheduling Tools:** Calendly, Google Calendar, Doodle
- Research Databases:** Bloomberg, Morningstar, Yahoo Finance
- Collaboration Software:** Slack, Notion, Microsoft SharePoint
- Compliance Tools:** FINRA, SEC Guidelines, Riskalyze

### EXPERIENCE

#### College Financial Representative Intern

Creative Financial Solutions 📅 June 2025 - Present 📍 Chicago, IL

Assist early-stage engagement between potential clients and experienced financial professionals, enhancing practical knowledge around financial sales and relationship management.

- Identified potential clients through active networking and referrals.
- Executed strategies that align with both personal ambitions and firm objectives.
- Scheduled meetings to deeply understand prospective client's financial goals.
- Utilized proprietary software for preparing tailored financial plans.

#### Financial Analyst

Springfield Financial Group 📅 January 2024 - May 2025 📍 Springfield, IL

Contributed analytical insight into creating client-centered financial plans while adapting to market dynamics to enhance service offerings.

- Developed tailored investment strategies based on thorough client assessments.
- Analyzed market trends leading to recommendations boosting product efficiency.
- Collaborated with senior teams crafting impactful presentations for client engagements.
- Assisted team members in operational improvements that streamlined processes.

### LEADERSHIP & AWARDS

- Securities Industry Essentials (SIE) certified in April 2025.
- Achieved Dean's List for outstanding academic performance during year 2022.

### CERTIFICATIONS

- Securities Industry Essentials (SIE) 📅 2025

## LANGUAGES

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English Native

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Spanish Intermediate

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## MY CAREER

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● College Financial  
Representative Intern at Creative  
Financial Solutions (1 Years)

● Financial Analyst at  
Springfield Financial Group (1.3  
Years)

- Series 6 📅 2026

## PROFESSIONAL AFFILIATIONS

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- Member of Finance Club, gaining insights in investment practices and strategies.
- Participated in university-led workshops aimed at strengthening financial literacy outreach.

## ADDITIONAL INFORMATION

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

## REFERENCES

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AVAILABLE ON REQUEST