Finley Decker

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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 2023
University of Illinois GPA: 3.7 *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

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

EXPERIENCE

College Financial Representative Intern June 2025 - Present

Creative Financial Solutions *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 January 2024 - May 2025

Springfield Financial Group *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
- Series 6 2026

PROFESSIONAL AFFILIATIONS

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

LANGUAGES

- English (Native)
- Spanish (Intermediate)

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST