Finley Decker

College Financial Representative Intern

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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

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.

Professional Communication

Decision Making

LANGUAGES

English — Native

Spanish — Intermediate

MY CAREER

- College Financial Representative Intern at Creative Financial Solutions (1 Years)
- Financial Analyst at Springfield Financial Group (1.3 Years)

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.

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST