

# 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

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

## CERTIFICATIONS

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- Securities Industry Essentials (SIE) 📅 2025
- 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.

## LANGUAGES

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- English (Native)
- Spanish (Intermediate)

## 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