



**College Financial Representative Intern**

**Finley Decker**

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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
- Professional Communication
- Decision Making

## LANGUAGES

English  
Native



Spanish  
Intermediate



## MY CAREER

# Yes

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

## 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

## SKILLS

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## **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
- 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.

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## **REFERENCES**

AVAILABLE ON REQUEST