Willa Becker

College Financial Representative

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STRENGTHS

Client Engagement
Built lasting connections with clients through active listening and tailored approaches.

Strategic Planning
Developed customized financial strategies that align with individual client goals.

Proactive Learning
Continuously engage in workshops to keep knowledge relevant and sharp in financial practices.

Team Collaboration
Partnered with peers in projects to leverage varied skill sets and perspectives for better outcomes.

Effective Communication
Articulated complex financial concepts simply, building client trust and confidence effortlessly.

SKILLS

Financial Planning

Client Relationship Management

Market Research

Time Management

Communication Skills

Sales Techniques

Investment Strategies

Marketing Fundamentals

Analytical Thinking

Presentation Skills

Team Development

Networking

Public Speaking

Problem Solving

Decision Making

SUMMARY

Motivated financial professional, eager for new challenges in financial planning. Extensive experience in client engagement and developing tailored financial strategies. Proven success in building strong relationships, helping clients achieve their goals, and adapting quickly to the evolving financial landscape. Strong commitment to personal growth through continuous training and guidance. Engaged in workshops, mentored by industry leaders, and involved in leadership programs to broaden expertise. Ready to leverage entrepreneurial spirit and creativity while engaging locally and nationally with experts.

EDUCATION

Bachelor of Science in Finance

University of Illinois at Chicago GPA: 3.7 2026 Chicago, IL

Coursework: *Financial Principles, Investment Strategies, Marketing Fundamentals, Business Ethics*

TECHNICAL SKILLS

- **Communication Tools:** Zoom, Slack, Microsoft Teams
- **Financial Planning Software:** eMoney, MoneyGuidePro, Wealthbox
- **Data Analysis Tools:** Excel, Tableau, Google Analytics
- **CRM Software:** Salesforce, HubSpot, Zoho CRM
- **Digital Marketing Platforms:** Facebook Ads, LinkedIn Advertising, Mailchimp
- **Presentation Software:** PowerPoint, Google Slides, Prezi
- **Research Tools:** Statista, Morningstar Direct, ThinkAdvisor
- **Project Management Tools:** Trello, Asana, Monday.com
- **Regulatory Compliance Tools:** FINRA BrokerCheck, NAIC Resource Center, SEC EDGAR
- **Document Management Systems:** DocuSign, Adobe Sign, ShareFile

EXPERIENCE

Financial Services Intern

Wealth Management Solutions June 2025 - Present Chicago, IL

Support financial advisors in crafting and implementing comprehensive financial plans. Participate in client discussions, focusing on specific goals and strategies. Research financial markets actively to identify prospective clients. Contribute to enhancing workflow efficiency while ensuring client satisfaction and engagement.

- Assisted financial advisors in developing comprehensive financial plans, prioritizing client long-term objectives.
- Engaged in one-on-one client meetings to discuss personalized financial strategies and offerings.
- Conducted thorough market research aimed at identifying potential leads to expand client acquisition efforts.
- Collaborated closely with team members, sharing insights to improve overall service quality.

Sales Associate

Future Finance Group August 2024 - May 2025 Chicago, IL

Worked to bolster sales efforts by developing deep connections with potential clients. Engaged in rigorous training modules to enhance sales techniques. Created marketing materials to strengthen outreach efforts and effectively communicate service offerings.

- Supported a dynamic sales team by cultivating meaningful relationships with prospective clients.
- Participated in extensive training sessions designed to sharpen sales skills and deepen product understanding.

LANGUAGES

English — Native

Spanish — Intermediate

MY CAREER

- Financial Services Intern at Wealth Management Solutions (1 Years)
- Sales Associate at Future Finance Group (9 Months)

- Spearheaded the creation of promotional materials targeting broader audiences interested in financial services.
- Contributed to achieving sales targets through collaboration with colleagues and active participation in strategy meetings.

LEADERSHIP & AWARDS

- Top Provider Award from Future Finance Group for achieving highest client satisfaction rate.
- Honor Roll recognition at University of Illinois at Chicago for academic excellence in finance-related coursework.

CERTIFICATIONS

- Series 6 Registration 2026
- Life and Health Insurance License 2026

PROFESSIONAL AFFILIATIONS

- Member of the Finance Club at University of Illinois to foster knowledge-sharing and networking.
- Active participant in campus outreach programs, connecting students with financial resources.

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST