

Malia Wise

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SUMMARY

Dynamic and motivated sales associate dedicated to aiding families in asset protection. Proven ability to engage clients by understanding their financial goals and tailoring solutions accordingly. Committed to continuous learning and growth within a team-focused environment. Experienced in fostering trust-based client relationships through diligent communication and support, ensuring every family feels valued and informed throughout their decision-making process. Recognized for exceptional presentation skills and top performance in client engagement metrics. Excited to bring this energy to Financial Guardians Group and contribute positively to clients' futures.

EDUCATION

Bachelor of Arts in Finance
University of Indianapolis GPA: 3.8
Coursework: Financial Analysis, Marketing Strategies, Economic Principles, Wealth Management

2027
Indianapolis, IN

TECHNICAL SKILLS

- Sales Tools:** CRM Software, Microsoft Office Suite, Google Workspace
- Financial Analysis Software:** QuickBooks, Excel, Tableau
- Marketing Channels:** Social Media Marketing, Email Campaigns, Online Advertising
- Presentation Tools:** PowerPoint, Google Slides, Canva
- Client Communication:** Video Conferencing Software, Phone Systems, Instant Messaging Apps
- Research Tools:** Market Analysis Software, Competitive Intelligence Tools, Survey Platforms
- Training Resources:** Webinars, Industry Seminars, Online Courses
- Professional Networking:** LinkedIn, Professional Associations, Local Business Networks
- Compliance Standards:** State Insurance Regulations, Financial Ethics Guidelines, Data Protection Laws
- Client Retention Strategies:** Follow-Up Notifications, Client Appreciation Events, Feedback Mechanisms

SKILLS

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|----------------------------------|------------------------------|-------------------------------|--------------------------------|
| • Client Relationship Management | • Presentation Skills | • Networking | • Technical Proficiency |
| • Effective Communication | • Team Collaboration | • Client Retention Strategies | • Sales Performance Monitoring |
| • Market Research | • Problem Solving | • Critical Thinking | • Negotiation Skills |
| • Financial Analysis | • Sales Strategy Development | • Conflict Resolution | • Customer Engagement |

EXPERIENCE

Sales Associate
Financial Advisors Inc.

June 2026 - Present
Indianapolis, IN

As a Sales Associate, engaged directly with clients, focusing on their financial aspirations and goals. Created tailored insurance solutions, significantly enhancing asset protection strategies for numerous families. Worked collaboratively within a high-energy environment, often refining sales techniques that lead to improved service delivery.

- Engaged clients in discussions to identify their financial needs, leading to custom-tailored advice.
- Designed presentations that highlighted product benefits, resulting in increased client satisfaction.
- Kept updated with market trends and financial products, guaranteeing relevance in client interactions.
- Established strong client relations, providing reassurance and guidance as they navigated their options.
- Collaborated effectively with team members to streamline sales processes and improve service quality.
- Achieved top performance ranking through the careful monitoring of engagement metrics and client feedback.

Sales Intern
Secure Futures Ltd.

January 2026 - May 2026
Indianapolis, IN

Contributed to the sales department by supporting senior associates during client meetings. Engaged in developing personalized financial strategies tailored for potential clients, while gaining valuable industry experience.

- Assisted in conducting client meetings, facilitating the gathering of vital personal financial information.
- Performed market research to identify target client segments, enhancing outreach efforts.
- Helped organize workshops that educated clients on effective asset protection strategies.
- Developed promotional materials aimed at increasing interest in various financial products.

- Maintained meticulous records of client preferences to guide future interactions and increase service efficacy.
- Received praise for taking initiative in proposing new outreach methods that effectively captured client inquiries.

LEADERSHIP & AWARDS

- Dean's List, University of Indianapolis (2025, 2026)
- Best Presenter, Finance Club Competition (2025)

CERTIFICATIONS

- Insurance License  2026

PROFESSIONAL AFFILIATIONS

- Member, Finance Club
- Volunteer, Local Community Financial Literacy Workshops

LANGUAGES

- English (Native)
- Spanish (Intermediate)

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST