
# Kane York

Financial Planning Analyst Intern

(313) 555-0123 kane.york@email.com

linkedin.com/in/kane-york 123 Maple Street, Detroit, MI 48226


## SUMMARY


Aspiring finance professional pursuing a Bachelor's Degree in Finance, eager to translate academic knowledge into practical experience. Proven abilities in managing communications between Financial Advisors and clients while ensuring compliance with regulations. Strong analytical skills and attention to detail developed through hands-on projects. Shouldering responsibilities in real-world settings fosters resilience and adaptability. Teamwork experiences enriched personal growth and built rewarding relationships with colleagues. Aiming to learn from seasoned experts while contributing value to investments along with market strategies.


## EDUCATION

**Bachelor's Degree in Finance**

University of Michigan GPA: 3.8 2025 Ann Arbor, MI

***Coursework:*** *Financial Analysis, Compliance Management, Capital Markets, Investment Strategies*

## TECHNICAL SKILLS

- **Communication Tools:** Slack, Microsoft Teams, Zoom
- **Financial Software:** QuickBooks, Bloomberg Terminal, Excel
- **Data Visualization:** Tableau, Microsoft Power BI, Google Data Studio
- **Analytical Tools:** SPSS, SAS, R
- **Presentation Tools:** Microsoft PowerPoint, Prezi, Canva
- **Project Management tools:** Trello, Asana, Monday.com
- **Compliance Monitoring:** FINRA, SEC Guidelines, ISO Standards
- **Research Methodologies:** Surveys, Interviews, Focus Groups
- **Investment Platforms:** E*TRADE, Fidelity, Charles Schwab
- **Accounting Principles:** GAAP, IFRS, Budgeting Techniques

## EXPERIENCE

### Financial Analyst

Clarity Financial Group January 2025 – Present Ann Arbor, MI

Engage in detailed financial analyses, collaborating with advisors to identify client needs. Conduct market research to bolster investment strategies and support compliance.

- Collaborated closely with financial advisors to discern unique client requirements.
- Conducted thorough market research, enriching investment strategy discussions.
- Prepared well-structured reports and dynamic presentations enhancing clarity for clients.
- Maintained effective communication lines among stakeholders, fostering transparent workflows.

### Financial Planning Intern

Visionary Wealth Partners June 2024 – December 2024 Lansing, MI

Supported portfolio management efforts while adhering closely to industry regulations and standards. Assisted in developing strong client relationships through proactive communication.

- Assisted advisors in curating tailored strategies for diverse client portfolios.
- Enhanced client satisfaction through timely and efficient communication.
- Participated in team meetings, providing support in crafting innovative financial management techniques.
- Performed administrative tasks while continuing commitment to maintaining regulatory compliance.

## STRENGTHS

**Effective Communication**
Established connections with clients as trusted liaison, addressing complex inquiries effortlessly.

**Analytical Acumen**
Interpreted intricate financial data accurately, enabling sound decision-making processes.

**Team Collaboration**
Thrived in team settings, shared insights that led to elevated strategic proposals.

**Adaptability**
Responded well to dynamic environments, adjusting approaches based on client feedback.

**Client Focus**
Demonstrated a dedication to client service, prioritizing needs—laid foundation for lasting trusts.

## SKILLS

Financial Analysis · Client Relations · Compliance Management · Market Research · Communication Skills · Advisory Support · Team Collaboration · Data Interpretation · Presentation Skills · Project Management · Customer Service · Problem Solving

Regulatory Knowledge

Negotiation Skills

Investment Strategies

## LANGUAGES

English — Native

Spanish — Intermediate

## MY CAREER


- Financial Analyst at Clarity Financial Group (1.4 Years)
- Financial Planning Intern at Visionary Wealth Partners (6 Months)

## LEADERSHIP & AWARDS

- Awarded Student Leadership Recognition for outstanding contributions to finance clubs and activities.
- Dean's List recipient for academic excellence during multiple semesters at University of Michigan.

## CERTIFICATIONS

- Certified Financial Planning (CFP) Candidate 2026

## PROFESSIONAL AFFILIATIONS

- Member of the Finance Club at University of Michigan, engaging in events that expand industry knowledge.
- Volunteer for Local Nonprofit Organizations, assisting with their financial literacy programs.

## ADDITIONAL INFORMATION

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

## REFERENCES

AVAILABLE ON REQUEST