Hana Parrish

ParaPlanner Intern

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SUMMARY

Enthusiastic finance intern skilled in client support and project management. Proven ability to prepare detailed financial analyses and assist with investment portfolio oversight while maintaining strong communication. Eager to deepen expertise in financial planning, refine workflows for team efficiency, and enhance client satisfaction through effective relationship management. Currently seeking opportunities to innovate within a dynamic team environment. Experience includes participation in various relevant projects, demonstrating hands-on involvement in delivering successful outcomes that align with the needs of diverse clients.

EDUCATION

Bachelor's Degree in Finance

University of Illinois at Chicago GPA: 3.8 2023 Chicago, IL

Coursework: *Corporate Finance, Investment Analysis, Financial Markets, Risk Management*

TECHNICAL SKILLS

- **Microsoft Office:** Excel, Word, PowerPoint
- **Financial Planning Software:** eMoney Advisor, RightCapital, Advizr
- **Database Management Tools:** Salesforce, HubSpot, Microsoft Access
- **Investment Research Platforms:** Morningstar, Bloomberg Terminal, FactSet
- **Project Management Tools:** Trello, Asana, Monday.com
- **Communication Tools:** Slack, Zoom, Microsoft Teams
- **Analytical Tools:** Tableau, Google Analytics, Excel
- **Reporting Software:** Tableau, Crystal Reports, Microsoft Power BI
- **Web Conferencing:** GoToMeeting, Cisco Webex, Zoom
- **CRM Software:** Salesforce, Zoho CRM, HubSpot

EXPERIENCE

Client Service Associate

WealthGuard Advisors June 2024 - Present Chicago, IL

Contributed effectively to client support operations focused on service excellence and portfolio management.

- Managed client service requests promptly, ensuring communication was clear and referrals were efficiently handled.
- Assisted with comprehensive financial reports and analysis tailored specifically to client goals and expectations.
- Collaborated on strategies related to investment portfolio management and rebalancing efforts, fostering teamwork.
- Actively participated in improvement activities targeting operational efficiency and overall timeline management.

Intern

FutureInvest Group January 2024 - May 2024 Chicago, IL

Provided support for the financial planning team, assisting with research and workflow development tasks.

- Conducted research on investment options, creating detailed reports beneficial for decision-making processes.
- Supported organization and management of client data, enhancing the team's ability to operate efficiently.
- Helped streamline office workflows, improving productivity and enhancing client interactions.
- Gained experience managing client relationships and understanding financial planning.

STRENGTHS

Effective Communication
Clear and impactful communicator both verbally and in writing; peers seek insights on project nuances.

Client-Centric Focus
Always prioritize client needs; approaches foster trust and reliability in all interactions.

Team Collaboration
Facilitates cooperative environments; experienced in sharing ideas and enhancing team dynamics.

Quick Learner
Adapt quickly to new systems and processes; inspired to embrace technology for improved efficiency.

Detail-Oriented
Thrive on being detail-focused, enhancing task execution by catching subtleties others may overlook.

SKILLS

Financial Analysis

Client Relationship Management

Microsoft Office Suite

Project Management

Investment Research

Organizational Skills

Time Management

Communication Skills

Data Analysis

Problem-Solving

Workflow Optimization

Customer Support

Reporting Techniques

Portfolio Management

Financial Reporting

LANGUAGES

English Native

Spanish Intermediate

MY CAREER

- Client Service Associate at WealthGuard Advisors (2 Years)
- Intern at FutureInvest Group (4 Months)

LEADERSHIP & AWARDS

- Dean's List - University of Illinois at Chicago (Fall 2020, Spring 2021, Fall 2022)
- Excellence in Finance Award - UIC Finance Club (Spring 2023)

CERTIFICATIONS

- Certified Financial Planner (CFP) 2026
- Financial Modeling & Valuation Analyst (FMVA) 2026

PROFESSIONAL AFFILIATIONS

- Member, UIC Finance Club, engaged in events and networking opportunities.
- Volunteer, Chicago Habitat for Humanity, helping develop community housing solutions.

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST