Sergio Matthews

Wealth Management Intern

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STRENGTHS

Analytical Skills
Consistently deliver actionable insights through data interpretation. Colleagues rely on my analysis for informed decisions.

Communication
Articulate complex ideas simply. Became the go-to person for explaining challenges to students who could not grasp topics.

Client Focus
Dedicated to enhancing client experiences and building lasting relationships. Gather feedback to continuously improve service offerings.

Team Collaboration
Foster strong partnerships across departments. Enjoy brainstorming and problem-solving together for collective success.

Problem Solving
Tackle challenges head-on. Received team recognition for resolving high-impact issues efficiently through creative thinking.

SKILLS

Financial Analysis · Market Research · Client Relationship Management · Strategic Planning · Data Analysis · Presentation Skills · Quantitative Analysis · Portfolio Management · Investment Strategy · Trend Analysis · Sales Support · Critical Thinking · Time Management · Problem Solving

SUMMARY

Enthusiastic candidate pursuing a deeper understanding of the wealth management sector. Eager to engage in market research, support client insights initiatives while collaborating with teams on marketing strategies. Strong analytical skills drive effective decision-making processes amid complex financial landscapes. Ready to contribute and learn from experienced professionals in this fast-paced environment. Aim to enhance knowledge and build valuable relationships throughout the internship experience. Committed to delivering thorough research that will bolster client engagement efforts and improve strategic outcomes across various projects.

EDUCATION

Bachelor's Degree in Finance

University of Illinois GPA: 3.6 2016 Champaign, IL

Coursework: *Financial Analysis, Market Research, Client Relationship Management, Strategic Planning*

TECHNICAL SKILLS

- **Financial Analysis Tools:** Excel, Tableau, QuickBooks
- **Communication Tools:** Slack, Microsoft Teams, Zoom
- **Statistical Software:** SPSS, R, Python
- **Presentation Software:** PowerPoint, Google Slides, Prezi
- **CRM Platforms:** Salesforce, HubSpot, Zoho CRM
- **Project Management Tools:** Asana, Trello, Microsoft Project
- **Research Platforms:** Statista, IBISWorld, Bloomberg
- **Analytical Tools:** MATLAB, SAS, Stata
- **Document Management:** SharePoint, Google Drive, OneDrive
- **Social Media Tools:** Hootsuite, Buffer, Sprout Social

EXPERIENCE

Senior Financial Analyst

Wealth Strategies Group March 2020 - Present Chicago, IL

Lead analyst conducting comprehensive market analysis to inform client recommendations and investment strategies. Collaborate cross-functionally to meet client engagement goals while enhancing retention plans. Deliver reports and presentations for stakeholders to guide decision-making.

- Identify emerging market trends for investment opportunities.
- Serve as primary contact for client advisory interactions.
- Facilitate workshops focused on data analyses and financial forecasting.
- Support strategic planning initiatives to optimize resource allocation.

Financial Analyst

Capital Wealth Management June 2016 - February 2020 Naperville, IL

Played a vital role in analyzing financial data to pinpoint areas for portfolio enhancement. Developed trust-based relationships with clients by assisting in crafting tailored financial plans, which positively influenced overall satisfaction. Collaborated closely with marketing teams through impactful presentation creation.

- Leveraged analytical tools to assess investment product performance.
- Presented actionable insights based on historical financial trends.
- Strengthened client ties through articulated communication strategies.
- Participated in continuous improvement discussions to elevate service delivery.

Team Collaboration

Adobe Creative Suite

LANGUAGES

English — Native

Spanish — Proficient

MY CAREER

- Senior Financial Analyst at Wealth Strategies Group (6.2 Years)
- Financial Analyst at Capital Wealth Management (3.7 Years)
- Intern at Springfield University (4 Months)

Intern

Springfield University | January 2016 - May 2016 | Springfield, IL

Assisted in various market research projects emphasizing client insight focus within financial trends. Contributed innovative marketing strategy proposals aimed at optimizing student financial services through cross-team collaboration.

- Collected secondary and primary data to bolster market studies.
- Collaborated on presentations showcasing research findings.
- Proposed creative solutions during strategy sessions to enhance outreach.
- Compiled detailed reports highlighting competitive landscape assessments.

LEADERSHIP & AWARDS

- Dean's List recognition for academic excellence in finance courses.
- Recipient of the Financial Excellence Scholarship for merit-based achievement.

CERTIFICATIONS

- Certified Financial Planner (CFP) 2021
- Financial Modeling Certification 2022

PROFESSIONAL AFFILIATIONS

- Member of the Finance Society, fostering networking among finance enthusiasts.
- Active participant in university-led financial literacy workshops for peers.

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST