

Sergio Matthews

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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

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
- Team Collaboration
- Adobe Creative Suite

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.

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.

LANGUAGES

- English (Native) • Spanish (Proficient)

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST