Robert Smith

Financial Associate/Representative

CONTACT DETAILS

1737 Marshville Road,
Alabama
(123)-456-7899
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SKILLS

Proficient in MS Word, Excel, Power Point, Pages, QuickBooks; Fluent in English; semi-conversational in Spanish and Tagalog.

LANGUAGES

English (Native)
French (Professional)
Spanish (Professional)

INTERESTS

Climbing
Snowboarding
Cooking
Reading

REFERENCES

Reference – 1 (Company Name)
Reference – 2 (Company Name)

PERSONAL STATEMENT

Highly qualified Financial Associate with experience in the industry. Enjoy creative problem solving and getting exposure on multiple projects, and excel in the collaborative environment on which your company prides itself.

WORK EXPERIENCE

Financial Associate/Representative

J.P. Morgan - September 2011 – 2019

Responsibilities:

- Responsible for the management and analysis of funding, liquidity risk, capital framework, and balance sheet items of the business.
- Analyze market value of troubled assets within the portfolio using the Fair Value pricing model.
- Perform industry and company research for business review packages and continuation plans.
- Analyze new business initiatives and products to assess their impact on regulatory capital, liquidity risk and funding requirements.
- Forecast and examine loan cash flows based on contractual fee, prepayment rates, and default assumptions.
- Formulate funding strategy under normal and market-wide shock scenarios through stress testing models.
- Conduct financial and business analyses including evaluating trends of liquidity and profitability analysis for existing and potential customers.

Financial Associate

Citibank N.A - 2008 – 2011

Responsibilities:

- Responsible for all monies coming in and out of the branch.
- Keeping a friendly environment, which include providing great customer service and helping coworkers with different tasks.
- Maintaining an operational as well compliance sound work environment to ensure that all bank policies are followed and bank is not open to any losses.
- Process customer transactions with accuracy and efficiency.
- Service customers with inquiries regarding their consumer and business accounts.
- Sustain knowledge of bank policies and procedures.
- Identify and refer sales opportunities..

Education

Bachelor of Science in Engineering - (NORTH CAROLINA A&T STATE UNIVERSITY - Greensboro, NC)

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