

# ROBERT SMITH

## Investment Assistant

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Dynamic and results-driven and with over 20 years of sales and customer service experience. Highly motivated professional with a passion for building relationships with people to help achieve common goals. Seeking a challenging position at a fast pace, high-energy company.

## EXPERIENCE

### Investment Assistant

#### ABC Corporation - APRIL 2005 - MAY 2006

- Setup & maintained Traditional, Roth, Simple & Sep IRAs  
Setup Certificate of Deposits Setup Health Savings Accounts.
- Transferred money to different accounts for customers.
- Deposited money into Checking, Savings & IRA accounts.
- Sent monthly transmittals to Prime Vest.
- Processed rollovers from 401k contributions into IRAs.
- Sent out quarterly IRA statements for 30 different customers.
- Sent out RMD (Required Minimum Distribution) to those that were eligible.

### Investment Assistant

#### Delta Corporation - 2004 - 2005

- Drafted research reports with investment thesis, DCF valuation and sensitivity scenarios to present the investment ideas Assisted in creating more .
- Support/back up Supervisor, who is a Vice President, & Mutual Fund Coordinator.
- Process new & existing accounts utilizing high-speed color scanner & Docupace system.
- Ensure daily checks & current accounts are prepared & processed via various windows programs.
- Manage/maintain "paperless" office for Home Office and Investment Advisers across the U.S.
- Delegated to research methods to maximize parking rental revenue Proposed parking mobile app which allows users to purchase/reserve spots online App .
- Calendar management of appointments and customer service relations.

## EDUCATION

- Bookkeeping & Accounting - May 1999(Professional Career

Development Institute - Norcross, GA)

## **SKILLS**

Microsoft Word, Microsoft Excel, Microsoft Outlook, Wordperfect, 10 Key, Powerpoint.