ROBERT SMITH

Associate Investment Manager

Phone: (0123)-456-789 | Email: info@qwikresume.com | Website: Qwikresume.com

SUMMARY

Investment Manager associated with state and federal regulations 12+ years of experience using the Microsoft Office suite to manipulate and present large data sets Excel experience involves daily use of pivot tables utilizing both static data sets and external data sources such as Access queries and IBM DB2 data tables through Open Data Base Connectivity (ODBC) connections.

CORE COMPETENCIES

Financial Planning & Analysis, Financial Modeling, Process Mapping, Internal control and Accounting.

PROFESSIONAL EXPERIENCE

Associate Investment Manager

MidAmerican Energy Company - May 2012 – 2020

Key Deliverables:

- Responsible for $2 billion in trust assets across Active and Passive strategies in Equity, Fixed Income, and Alternative asset classes.
- Managed asset allocations based on established investment policies and monitor investment performance compared to benchmarks.
- Established and maintained close working relationships with investment managers, trustees, consultants, actuaries, and auditors.
- Coordinated the evaluation and selection of investment managers and other external advisors.
- Evaluated and replaced six investment managers.
- Worked directly with executive committees responsible for the oversight of the Pension, Nuclear Decommissioning and Foundation trusts.
- Provided analysis, reporting and attend committee meetings as a subject matter expert.

Investment Manager

Delta Corporation - 2007 – 2012

Key Deliverables:

- Manage all functions of financial planning and investment management office.
- Build and manage portfolios for high net worth individuals and pension plans.
- Build and maintain customer relationships.
- Responsible for analyzing and implementing all profit and loss for a business.
- Utilized negotiation, leasing, asset management and consulting skills for entrepreneurs with nationwide portfolios; secured and qualified vendors.
- Researching and managing stock trades, index funds and real estate Total asset values exceeded $1M; investment earnings ranged from 10% - 1, 000%.

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- Coordinated with lessees, banks, and appraisers; oversee physical Construction/Remodeling of properties.

EDUCATION

Master of Business Administration - (Iowa State University - Ames, IA)

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