

# Robert Smith

## Asst. Investment Specialist

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## SUMMARY

Experience developing profitable investment strategies and analyzing business operations. Aiming to utilize strong prioritization skills and analytical ability to achieve the goals.

## SKILLS

Financial Accounting Software, Trade Flow Software.

## WORK EXPERIENCE

### Asst. Investment Specialist

ABC Corporation - July 2009 - October 2010

- Performed active trade support functions for senior portfolio managers.
- Monitored cash balances within client portfolios on a daily basis.
- Measured risk and return characteristics of model portfolios for various investment strategies through the use of the firms analytics software.
- Researched market prices and traded fixed income securities under the direction of supervisors.
- Analyzed the performance of investment strategies and pricing methods to ensure the firm was compliant with internal policies.
- Performed allocation of block trades to individual client accounts.
- Resolved trade errors with brokers and served as a point of contact for the firms custodian.

### Investment Specialist

ABC Corporation - 2007 - 2009

- Budget creation and monthly review.
- Review contractors invoices (i.e. regular and additional).
- Control of investment in capital repairs and replacement of technological equipment in automotive repair shops, car sale agencies, and gas stations assuring adherence to budget.
- Technical inspections on site.
- Procurement of domestic and imported construction materials and technological equipment for the approved investments..
- This is Dummy Description data, Replace with job description relevant to your current role.

## EDUCATION

Bachelor of Business Administration in Finance - 2005 (Shidler College of Business, University of Hawaii at Manoa - Honolulu, HI)