

Aisha Patel

aisha.patel@example.com • (555) 123-4567 • Chicago, IL • linkedin.com/in/aishapatel

SUMMARY

Detail-oriented and motivated recent graduate with a Bachelor of Science in Finance. Proven ability to analyze financial data and provide personalized investment strategies. Eager to leverage analytical skills and a customer-focused approach as an Entry Level Financial Advisor.

EXPERIENCE

Financial Analyst Intern

Jan 2023 - Present

Wealth Management Group, Chicago, IL

- Assisted in developing financial plans for over 30 clients, leading to a 15% increase in client satisfaction ratings.
- Performed market analysis that identified investment opportunities worth \$500,000 in potential revenue.
- Utilized Excel and financial modeling techniques to create performance reports that improved decision-making efficiency by 25%.

Finance Intern

Jun 2022 - Dec 2022

ABC Financial Services, Chicago, IL

- Supported the financial advisory team by preparing client presentations that enhanced communication and resulted in 10 new client acquisitions.
- Conducted a comparative analysis of investment portfolios, leading to the recommendation of adjustments that improved returns by 12%.
- Gained hands-on experience with CRM software to manage client interactions effectively.

Customer Service Representative

May 2020 - May 2022

XYZ Bank, Chicago, IL

- Managed customer inquiries and resolved issues, achieving a 95% satisfaction rate.
- Trained new employees on financial product offerings, enhancing team performance.
- Utilized data entry skills to maintain accurate records, reducing processing time by 20%.

EDUCATION

Bachelor of Science in Finance

May 2022

University of Illinois at Chicago, Chicago, IL • GPA: 3.7

SKILLS

Technical Skills: Financial Modeling, Data Analysis, Investment Strategies, Market Research

Tools & Frameworks: Microsoft Excel, Tableau, QuickBooks, CRM Software