

Jasmine Patel

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SUMMARY

Detail-oriented Stockbroker with over 5 years of experience in equity trading and portfolio management. Proven track record of exceeding sales targets and delivering comprehensive financial advice to clients, ensuring optimal investment strategies.

EXPERIENCE

Stockbroker

Jan 2022 - Present

Elite Trading Group, New York, NY

- Increased client portfolio value by 30% within 12 months through strategic equity investments.
- Achieved a 95% client retention rate by providing tailored financial advice and market analysis.
- Utilized advanced trading platforms and algorithms to execute trades, reducing transaction costs by 15%.

Junior Stockbroker

Jun 2018 - Dec 2021

Investment Solutions Inc., New York, NY

- Assisted in managing over \$50 million in client assets with an average annual return of 12%.
- Conducted market research and analysis to inform investment recommendations, leading to a 20% increase in client investments.
- Developed strong relationships with clients, resulting in a 40% increase in referrals.

Financial Analyst Intern

Jan 2018 - May 2018

Wealth Management Advisors, New York, NY

- Collaborated with senior analysts to assess financial performance of investment portfolios.
- Prepared and presented reports on market trends, contributing to informed decision-making for client portfolios.
- Utilized Excel and financial modeling techniques to forecast investment outcomes.

EDUCATION

Bachelor of Science in Finance

May 2018

New York University, New York, NY • GPA: 3.7

SKILLS

Technical Skills: Equity Trading, Portfolio Management, Financial Analysis, Market Research

Tools & Frameworks: Bloomberg Terminal, TradingView, Excel Financial Modeling