

Fabian Finance

Boca Raton, FL | (561) 555-3366 | ffin@fau.edu

Education

Bachelor of Business Administration in Finance
Florida Atlantic University

May 20XX
Boca Raton, FL

Software Skills

Adaptive Planning, XL Reporting, Tagetik, Intacct, NetSuite

Relevant Experience

Financial Analyst Intern

Jan 20XX – Present

Vasel Lobosco Financial

Lake Worth, FL

- Interview clients to determine their expenses, income, tax status, financial objectives, and other relevant information needed to aid in developing a financial plan
- Recommend strategies for clients to use to achieve their financial goals through advice on debt management and investments
- Utilize spreadsheets and market research to support financial advice
- Analyze data on price, stability, economic influences affecting investment opportunities and report findings to other members of the finance team
- Assist in the arrangement of plans of action for client investment using financial analyses

Office Clerk

March 20XX – Nov 20XX

Sterling & Figgis Finance

Boynton Beach, FL

- Inspected transactions to verify compliance with financial policies and procedures
- Updated company listings of accounts receivable and accounts payable
- Maintained log of pay amounts, hours of work, and deductions for a total of 15 employees
- Processed and prepared essential documents such as business and expense reports
- Proofread financial data reports and recorded important information for the use of finance teams

Additional Experience

Supplemental Instructor

Aug 20XX – Dec 20XX

Florida Atlantic University

Boca Raton, FL

- Maintained contact with the Quantitative Methods in Administration course professor throughout the term to clarify course requirements and discuss future lesson plans
- Attended all class meetings to ensure accurate notes were taken and to obtain an understanding of the assignments given so that the SI sessions were precise in learning activities
- Supplied students with handouts, informal quizzes, and additional learning aids during sessions to reinforce subject matter

Memberships

The Investors Association, *Member*

May 20XX - Present

Languages

Fluent in English, Spanish and French



FAU CAREER CENTER

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