

Jerry A. Seinfeld

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Successful **Financial Planning Professional** with over three years of personal and retirement planning experience. Achieved double-digit financial returns for my clients by developing personalized investment portfolios.

SKILLS/ABILITIES

- Proficient in Microsoft Word, Excel, Access, and PowerPoint
- Special emphasis in Microsoft Excel creating spreadsheets, charts, and valuation/forecast forms specifically designed for analysis and comparison purposes
- Licenses: Series 7, 66, Life, Health, and Disability in Washington and Oregon
- Strong communication skills; written and verbal
- Extensive training in risk analysis, investment and insurance portfolio analysis, company financial analysis, case development and case presentations, and employee benefits
- Enjoys identifying needs, recommending solutions, and taking action

WORK EXPERIENCE

Waddell & Reed, Medford, OR

2011-present

Financial Advisor

- Target prospective clients and help them make progress with their financial goals
- Educate, guide, and help clients make the best possible decisions for their future
- Specialize in comprehensive financial planning and investment portfolios
- Helped businesses with their benefits, including setting up 401(k)s, health insurance, and health savings accounts
- Conducted community financial workshops, educating the public in areas of budgeting, money management, asset allocation, risk vs. return, college education funding, and retirement planning
- Financial analysis and investment planning for clients

Bank of America, Vancouver, WA

2008 - 2011

Senior Teller

- Built customer loyalty through courtesy and friendliness as an ambassador of the bank
- Ensured accurate and timely processing of all transactions
- Promoted consumer services and products through customer education and cross-sales

EDUCATION

Washington State University Vancouver, Vancouver, WA

June 2010

Bachelor of Arts in Business Administration

Major in Finance with a minor in Accounting

Graduated with honors