
Associate Portfolio Manager Resume

Job Objective

Seeking Associate Portfolio Manager Position with reputable organization in which my experience can be a positive influence on the growth of company.

Highlights of Qualifications:

- Huge experience in managing investments for consulting industries
 - Huge knowledge of economics and investment theory
 - Exceptional knowledge of financial risk models and associated concepts
 - Immense ability to speak effectively in front of audience
 - Excellent ability to adapt to changes quickly
 - Proficient with Access, Excel, VBA, and modeling software packages
 - Outstanding communication skills in both oral and written forms
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Professional Experience:

Associate Portfolio Manager
BNY Mellon, Closter, NJ
October 2008 – Present

- Coordinated with senior portfolio manager and developed ways to ensure client satisfaction.
- Prepared client presentations and evaluated all sales and investment materials for same.
- Assisted senior in handling large projects.
- Analyzed client portfolios using various complex data services and performed research.
- Ensured effective implementation of investment programs and achieved all objectives.
- Administered all policies and ensured compliance to procedures.

Quantitative Portfolio Analyst
Morgan Stanley, Closter, NJ
August 2003 – September 2008

- Designed and maintained strategies for various allocation models.
- Maintained and developed matrixes to improve efficiency.
- Analyzed client portfolio and suggested products and services according to requirements.
- Assisted departments in analyzing risk for new products and strategies.
- Managed all data and analyzed it quantitatively.
- Developed models to analyze risk profiles.

Portfolio Specialist
TIAA-CREF, Closter, NJ
May 1998 – July 2003

- Coordinated with marketing and client service team and analyzed market requirement.
 - Participated in client reviews and meetings and ensured satisfaction of client.
 - Prepared quarterly reports for client on market condition and performance.
 - Monitored client requests and prepared ad hoc responses.
 - Evaluated all investment related question and ensured accuracy in answers.
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Education:

Bachelor's Degree in Finance or Economics
Northwestern College, Saint Paul, MN

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