
FINANCIAL PLANNING ASSISTANT RESUME

Objective:

Seeking the position of Financial Planning Assistant.

Summary of Skills:

- Familiarity with data warehouse extraction and budget platforms
 - Proficient with Microsoft office products – Excel and Access SQL
 - Ability to multi-task and meet new challenges with open mind and optimistic response
 - Strong interpersonal skills
 - Ability to build and deepen client relationships
 - Positive attitude, high ethical standards and integrity
 - Excellent written and verbal communication skills
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Work Experience:

Financial Planning Assistant
Money Managers, Inc, Grand Rapids, MI
August 2005 to till date

- Processed, overseen, reconciled, and communicated the successful completion of all client requests.
- Prepared and maintained documents and client files in accordance with FINRA and SEC requirements.
- Gathered performance and investment data.
- Assisted in modeling client and matter pricing.
- Determined optimal staffing margin and profitability.

Financial Planning Assistant
Moneta Group, Grand Rapids, MI
May 2000 to July 2005

- Supervised monthly tracking and edits of all attorney status changes.
 - Analyzed all monthly changes for reasonableness.
 - Developed, implemented and updated effective financial and operational information.
 - Assisted in identifying trends and developments in competitive environments.
 - Assisted in developing ad hoc integrated revenue and expense analyses.
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Education:

Associate Degree in Finance
University of South Alabama, Mobile, AL

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