
INVESTMENT ASSISTANT RESUME

Objective:

Seeking a position as Investment Assistant where extensive experience and superior organization skills will be fully utilized.

Summary of Skills:

- Extensive knowledge of Investment, Market and Insurance
- Good understanding of financial markets
- Ability to collate and create summarized reports from various data sources
- Ability to compile and generate various sales and marketing reports
- Ability to work quickly and accurately under time constraints is essential
- Sound knowledge of relationship management

Work Experience:

Investment Assistant
JPMorgan Chase, San Francisco, CA
August 2005 to till date

- Assisted Investment Advisors to initiate sales activities, during peak time.
- Edited and updated quarterly Performance Reports.
- Collected, entered and reconciled data in Bond and Equity Portfolio Analysis systems.
- Worked within delegated authority and standard department guidelines.
- Handled day-to-day client calls, answered questions.
- Resolved client problems and escalated beyond specified authority.

Investment Assistant
Adecco, San Francisco, CA
May 2000 to July 2005

- Performed and monitored account trades within delegated authority.
- Completed paperwork for client account transactions from start to finish.
- Updated and maintained ACT database regarding client information and financial activity.

Education:

Associate degree in Finance
Duke University, Durham, NC

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