

ISABELLA INVESTOR

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Qualifications

- Certified in Microsoft Excel.
- 2+ years exceptional customer service experience demonstrated by bringing in new clients at State Farm Insurance through social media posts and cold calling.
- Excellent analysis, research, and reporting abilities cultivated through advance coursework in finance at Seattle Pacific University and a financial analyst internship.

EDUCATION

Seattle Pacific University, Seattle, WA **June 2019**
Bachelor of Arts in Business Administration

- Concentration: Finance

Bellevue College, Bellevue, WA **June 2017**
Associate of Arts and Sciences (AAS)

EXPERIENCE

Financial Analyst Intern

Seattle Department of Transportation (SDOT), Seattle, WA **June 2017 – June 2018**

- Assisted Senior Analyst with both monthly and ad hoc reporting and budget monitoring.
- Partnered with accounting and project management team to execute cost transfers and correct project tracking.
- Created a vacancy analysis report which resulted in identifying a cost savings of over \$500,000 and documented procedure for future analysts to utilize.
- Provided policy and planning project level labor analysis which allowed managers to monitor their budgets, correct charges, and identify risks and opportunities.
- Utilized excel reporting to extract actionable insights and database queries, including the following functions: pivot tables, macros, slicers, v-lookups, and IF statements.
- Wrote a print macro that automated PDF projection of reports for multiple divisions of SDOT, saving senior analysts time on monthly reporting.

Insurance and Risk Management Consultant

State Farm Insurance, Bothell, WA **June 2016 – August 2017**

- Communicated effectively and worked together as a team of 10 to be the highest producing insurance agency in the State of Washington.
- Met with clients to review financial assets and properly assess what type of insurance would adequately protect them.
- Acquired new 20 new clients and built a rapport promoting a lifelong relationship between the company and the client.
- Achieved Junior Associate \$100,000 premium sales goal by 150%.

Associate Agent Intern

State Farm Insurance, Bothell, WA **Summer 2015**

- Coordinated marketing events, through Facebook, Twitter and Instagram, and promoted the brand image of State Farm Insurance.
- Dedicated time and effort to the growth of the agency by spending over 50 hours cold calling and quoting over \$500,000 in premiums.

PROFESSIONAL AFFILIATIONS

Student Investment Club Member

Seattle Pacific University, Seattle, WA **June 2015 – Present**

- Research and recommend companies for investment resulting in a 5% gain in the portfolio.
- Assist in overseeing a \$120,000 fund by monitoring financial statements and conducting ratio analysis.