BELLA MOMOA

FINANCIAL SERVICES TRAINEE

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CALGARY, ALBERTA, CANADA

Goal-oriented and focused learner ready to excel in the financial services industry.

- Analyze, study, and process complex data, statistics, finances, and reports.
- Assess situations, evaluate risk, and draw careful analysis to make sound and profitable decisions.
- Interact effectively with various individuals, articulating and communicating ideas accordingly.

Work Experience

Front Desk Associate Feb 20xx – Aug 20xx
Gold's Gym – Calgary, Alberta

Financial Products and Services Experience

- Developed financial strategies for clients by analyzing their financial goals and leveraging insights on savings, investments, and debt management, leading to an enhanced portfolio performance for the clientele.
- Conducted competitive analysis using Survey Monkey and SEMrush on competitors' financial products, leading to strategic enhancements in core product offerings and contributing to a 10% growth in client base.

Relevant Relationship Building Experience

- Shadowed senior financial advisors in client meetings and employed learned communication strategies and relationship-building techniques, contributing to a 12% increase in client retention rates.
- Organized and implemented financial literacy workshops for clients using Kahoot and Quizlet, thereby enhancing client-advisor relationships and enhancing clients' understanding of financial planning.

Crew Member Jan 20xx – Feb 20xx
MacDonald's – Calgary, Alberta

Relevant Risk Management Experience

- Shadowed senior financial advisors in client meetings and employed learned communication strategies and relationship-building techniques, contributing to a 12% increase in client retention rates.
- Organized and implemented financial literacy workshops for clients using Kahoot and Quizlet, enhancing client-advisor relationships and improving clients' understanding of financial planning. reports

Relevant Financial Modeling Experience

- Developed financial models to assess investment opportunities by analyzing market trends and financial statements, resulting in a 15% increase in investor interest for the client portfolio through strategic reports.
- Streamlined monthly financial performance reviews using advanced VLOOKUP Excel techniques and QuickBooks software, reducing report generation time by X%

Skill

- Accounting
- Budgeting and Forecasting
- Financial Analysis
- Information Gathering
- Information Processing
- Information Analysis
- Project Management
- Strategic Planning
- Risk Management
- Stock Work Ethics

App and Software Proficiencies

- Conditional Formatting
- Dashboard Creation
- GAAP
- DAX
- MS Excel (VLOOKUP)
- QuickBooks
- Power BI
- Oracle Financials
- IRIS Software
- Statistical Computing
- R Base Statistics
- RMS Statistical Macros
- Advanced Excel Macros

Education

Master's in Business (Financial Services)
University of Alberta Jan 20xx – Feb 20xx

Bachelor of Finance (Financial Services)
University of Alberta Jan 20xx – Feb 20xx

Interests

- Certified Open Water Scuba Diver, 20XX
- Writer/Blogger, 20XX–Present
- Photography (landscape and portrait)
- Volunteering (environmental conservation)
- Solving Puzzles
- Swimming
- Playing 6-a-side Football