

ISABELLA INVESTOR

425-890-6743, sjones@gmail.com
555 28th Ave West. Seattle, WA 98199

OBJECTIVE

Seeking a finance position that will utilize my business background, interpersonal skills, and hard work ethic. Strive to provide insightful analytical and reporting support while enabling key leaders to make timely data driven decisions.

EDUCATION

Seattle Pacific University, Seattle, WA
Bachelor of Arts in Business Administration

- Concentration: Finance

June 2016

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

June 2014

EXPERIENCE

Financial Analyst Intern

Seattle Department of Transportation (SDOT), Seattle, WA

2015 – 2016

- Assist 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

2013 – 2015

- Communicated effectively and worked together as a team 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.
- Successfully acquired 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

2013

- Coordinated marketing events 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

2015 – Present

- Research and recommend companies for investment.
- Assist in overseeing a \$120,000 fund monitoring financial statements and conducting ratio analysis.