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| **William Jeong** |  | **Profile**Financial planning graduate with strong recent internship experience serving individuals and small businesses. Skilled at offering clients sound financial advice based on rigorous data analysis. |
| Financial Advisor Resume (876) 678-8765 w.jeong@myemail.com 345 Red Street, Manchester, NH 23456 |  |
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|  | **EXPERIENCE****Accounting & Finance Intern,** Way Up, Manchester, NH May 2022 to Present* Help produce budgets and financial projections for individuals and small businesses
* Contribute to fact-finding and progress meetings with clients, and respond to phone and email inquiries

**Highlights:*** Earned high marks on all 3 formal reviews for overall diligence and customer focus
* Created and updated financial spreadsheets and reports with 99.9% accuracy
* Earned 98% positive feedback on all customer interactions

**Customer Service Specialist,** Rick’s Sporting Goods, Manchester, NH July 2020 to May 2022* Gained strong foundation in customer service, invoicing, and transaction processing
 |
| **EDUCATION****Bachelor of Science (BS) in Financial Planning**Southern New Hampshire University, Manchester, NH 2022**Select Coursework:*** Applied Statistics
* Financial Reporting & Analysis
* Financial Statements
* Wealth Management

**KEY SKILLS*** Customer Service & Relations
* Data Gathering & Analysis
* Financial Reporting
* Mathematical Reasoning
* Microsoft Office Suite
* Team Collaboration

**CERTIFICATIONS*** Certified Financial Planner, CFP Board 2022
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