**Tim J. Brook**

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**Job Objective:**

Detail-oriented and focused professional with over 5+ years of experience seeking the position of Investment Administrative Assistant in 'XYZ Financial Services'. Impeccable understanding of the financial instruments and ability to provide advice that guarantees optimal ROI.

**Summary of Skills:**

* In-depth understanding of financial planning, concepts, and practices
* Extensive knowledge of different financial instruments like stock, mutual funds, equity funds, shares and securities
* Familiarity with administrative tasks related to financial assistance
* Ability to perform cash-flow management and required documentation
* Ability to rebalance clients' portfolios by assessing asset allocation according to the changing market strategies
* Expertise in researching market trends, performing data management, generating reports, and developing best plans for customers
* Proficient in using MS Office Suite, Adobe Creative Design Suite, Microsoft Server database and accounting applications
* Capable of maintaining confidentiality, and safeguarding financial information

**Work Experience:**

Investment Administrative Assistant

CSL Behring Company, Jackson, Mississippi

November 2016 – Present

* Delivering materials related to external financial compliance audits and ad hoc request from customers
* Reviewing research done by interns and preparing final reports to assist portfolio managers and clients make sound decisions
* Updating weekly investment done by clients in the OPAL system
* Assisting project managers, senior financial advisers to do thorough investigation and value analysis of the new high-performing funds, and informing potential customers about it
* Working with various brokers to understand how to decide stock and income trades to understand the best closing time
* Preparing monthly internal report on funds, stock and fixed income instruments provided by the company
* Updating database, and protecting confidentiality of investment information

Investment Administrative Assistant

BankPlus Incorporation Pvt. Ltd., Jackson, Mississippi

April 2014 – October 2016

* Actively engaged with prospective clients to assess their financial needs, identified appropriate solutions, and suggested proper recommendations based on their capital
* Performed different administrative tasks like maintaining records, opening new records, and updating database
* Collaborated with financial adviser and marketing team to develop new promotional strategies and increased client base by 30%
* Monitored competitor funds in the market and implemented necessary strategies according to changes after consent from customers
* Took initiative to send monthly reports about the number of units purchased, and a summary on performance of mutual funds
* Answered queries on phone calls, and directed clients to the respective financial adviser after noting down their request
* Maintained account receivables and account payables for the office as required

**Internship:**

Investment Administrative Intern

ProAssurance Unlimited, Jackson, Mississippi

September 2013 – March 2014

* Amended and updated clients' account as necessary by providing customer feedback to the advisers about the issues raised on accounts
* Completed paperwork for new and old clients for investment purchase
* Researched investment trends to identify the best funds, and prepared report on top performing stocks in the share market
* Investigated start-up companies and contributed to an initiative that assists small scale companies for investment process including deal sourcing, identifying target audience, and potential areas in the field of customer business
* Organized online conferences for clients investing for the first time in equity funds to give a clear perspective
* Scheduled client appointments with respective financial advisers, and sent reminders over call or mail 2 days prior to the meeting

**Education:**

* Bachelor's Degree in Business Management  
  Mississippi State University, Canton, MS   
  2014

**Reference:**

On request.