

 (415) 555-2345

 david.chen@email.com

 San Francisco, CA

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EDUCATION

Bachelor of Science in Accounting

University of California, Berkeley | Berkeley, CA
2012

Certifications & Licenses

- Chartered Financial Analyst (CFA) – Completed Level III, 2020
- Financial Risk Manager (FRM) – Certified in 2018
- Series 7 & 63 Licenses – Licensed by FINRA in 2015
- Bloomberg Market Concepts (BMC) – Certified in 2014

SKILLS

- Investment Analysis & Strategy
- Portfolio Management & Optimization
- Financial Modeling & Valuation
- Risk Assessment
- Market Research & Trend Analysis
- Client Reporting & Communication

DAVID CHEN

SENIOR INVESTMENT FINANCIAL ANALYST

PROFESSIONAL SUMMARY

Experienced Senior Investment Financial Analyst with 11 years in investment portfolio management, financial modeling, and market analysis. Proven ability to drive investment strategies and manage risk for high-value portfolios in competitive financial markets. Recognized for strong analytical skills, strategic insights, and a keen understanding of market trends.

EXPERIENCE

- October 2018 - Now

Senior Investment Financial Analyst

Summit Capital Advisors | San Francisco, CA /

- Manage a 0M investment portfolio, achieving an annualized return of 13% through diversified investment strategies and proactive risk management.
- Build complex financial models to forecast ROI, resulting in a 20% improvement in forecast accuracy and aiding in strategic investment decisions.
- Conduct ongoing market research and trend analysis, providing actionable insights that supported a 15% growth in assets under management.
- Perform due diligence and valuation analysis for potential acquisitions, contributing to strategic expansion initiatives.

- January 2014 - October 2018

Investment Analyst

Westwood Financial Group | San Francisco, CA /

- Conducted equity research and developed models for evaluating investment opportunities, improving portfolio selection accuracy by 18%.
- Prepared quarterly performance and risk assessment reports for clients, enhancing client trust and retention.
- Assisted in implementing a new investment management software, cutting data retrieval time by 40% and streamlining reporting.