

 (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.