Prep Your Path Resume Sample

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Profile

Client relations specialist with four years of combined experience in strategic planning, new business development, account management, and customer support at investment management and technology companies. Demonstrated ability to analyze data, develop new business pitches, manage clients and teams, and train people to achieve results.

Core Competencies and Skills

Strategic Planning	New Business Development	Sales/Relationship Management
Competitive Analyses	New Business Pitches	Post-Sales Support/Customer Service
Data Analytics	Cold Calling/Client Presentations	Training & Development

Education

University of Virginia, Charlottesville, VA (2012)
BA in Economics, with distinction; Minor in Global Culture and Commerce; GPA: 3.7

Experience

Makena Capital Management, Menlo Park, CA (August 2015 to Present)
Sales & Investor Relations
Business Development Analyst — First-hire for a new 6-person group
Developed strategic plans and raised funds for an $18 billion global, multi-asset investment management company by identifying brand positioning, product offerings, and sales procedures and processes

- Pitched pooled investment vehicles to prospective investors by analyzing data, developing pitch books, collaborating with management and operations, and coordinating meetings and timetables
- Created 21 Requests for Proposal (RFPs) for prospective client pitches (2016)
- Raised $200 million for a real estate fund (2017) and $200 million for a private equity fund (2015)
- Raised over $200 million from new clients ($170 million in 2016 and $40 million in 2015)
- Managed the company website (www.makenacap.com) to provide content and ensure accuracy
- Developed and implemented a training program for two new managing directors on the sales team

Bloomberg L.P., New York, NY (2010—2015)
Terminal Sales & Account Management
Account Representative — 44 clients in the New England region (January 2015—August 2015)
Client Team Representative — 400 financial professionals in Boston (February 2014—January 2015)
Marketed Bloomberg Terminals to wealth management and private equity firms, hedge funds, corporations, and investment advisors for an $8.3 billion global provider of financial tools and solutions

- Developed sales initiatives and offered consulting services in collaboration with research & development, operations, and financial specialists teams
- Achieved an individual sales revenue target of $3.5 million in 2015 and $10 million in 2014 for the team
- Made on-site sales calls 20 days per quarter to maintain relationships and identify new opportunities (2015)
- Led monthly introductory training seminars for clients (2014)

Fixed Income Analytics
Specialist — Analytics and Derivative (March 2013—January 2014)
Analytics Representative — Including a 13-week training program (August 2012—March 2013)
Provided client services related to interest rate swaps, credit default swaps, and futures contracts by working with traders, portfolio managers, and analysts

- Specialized in fixed income portfolio construction, data analytics, and Excel modeling
- Assisted on the Help Desk answering client questions and developing in-depth financial markets knowledge
- Selected as one of four analytics representatives out of 140 to train new hires companywide

***Sales and Analytics**, Intern* (Summers 2010 and 2011)

Computer Skills: Microsoft Office (Word, PowerPoint, Excel), and the Bloomberg Terminal.
Fundraise and write grants for Selamta Family Project, Ethiopia (2007 to Present).
Raised in Rye, NY. LinkedIn: www.linkedin.com/in/acfinnegan. Date: May 2017