CAREERTUNERS
Moving your career forward

Case Study: Investment Performance Analyst

Our resume revamp helped Anees land his dream job!

Here's what he had to say about our work:

Anees A. · 2nd

Sr. Investment Performance Analyst at CBRE - CIPM Level I Passed

Anees A. was Zunaira's client

Zunaira is a professional and an exceptional resume writer with a passion for helping others to reach their goals. During my appointment with her, she was very professional and asked industry specific questions, and designed the best version of my career story enabling me to stand out from the crowd and land the right dream job. I would recommend her to all seeking resume advice.

His backstory:

Anees was looking for Investment/Portfolio Analyst roles. He had some experience in the financial services industry.

However, his resume:

- Lacked an attention-grabbing visual center (top section).
- Was missing a lot of required keywords.
- Focused on his responsibilities and not his achievements.

Here's what we did:

1. Created a strong visual center, speaking to employer needs.
2. Optimized his resume with keywords. Created skills table and weaved critical keywords throughout the resume.
3. Highlighted his achievements, using a results-first approach.

Where is Anees now?

Soon after the resume revamp, Anees landed an Investment Performance Analyst role at Kayne Anderson Rudnick.

He works as a Sr. Investor Performance Analyst at CBRE now.

Warning: The following pages have been saved as images in order to protect Anees' work as well as our work from being copied and indexed. As a result, uploading this exact file into an Applicant Tracking System will not work. **If you are interested in hiring him, please email us at contact@careertuners.com.**

Here's the resume we made for him:

ANEES AYAZ

818.966.3335 | anees.ayaz87@yahoo.com | Los Angeles, CA 91406 | LinkedIn

Financial & Investment Planning ◆ Portfolio Analysis ◆ Investment Operations ◆ Insurance & Retirement Planning

Financial services and investment planning professional aligning clients' financial objectives with viable, best-fit investment and portfolio solutions by rendering high-touch consultancy. Financial industry SME leading investment management operations, supporting clients with creating robust financial plans, and upholding documentation accuracy by proactively utilizing QC measures. Well-balanced academic credentials with MS in Financial Economics and certification in Investment Foundations (CFA Institute).

Financial Plan Development	Cross-Functional Collaboration	Envestnet, Infusionsoft, Pipedrive, Redtail
Investment Consulting	Stakeholders Relationship Management	MS Office Suite, Pershing, SPSS
Investment & Wealth Management	Customer Relationship Management	Data & Business Analytics

PROFESSIONAL EXPERIENCE

Investment Consultant, Wahed Invest LLC — 10/2018 – Present

Brought onboard as an FTE following exceptional consultancy support as an intern at this robo-advisor. Helped customers successfully invest in globally diversified portfolios by assisting them with opening accounts and processing transfers; created product awareness and address queries as an investment and IRA SME. Built and nurtured long-lasting relationships with 1000+ customers across California; conducted online product demos. Developed marketing plans in collaboration with the VP and the Marketing Manager.

- Grew the client base by holding seminars and setting booths at tradeshows to communicate the company's investment platform and services information to potential clients; maintained 80% lead and 100% referral conversion rate through proactive outreach.
- Streamlined investment decision-making for clients by educating them on the company's' portfolio design, including asset allocation and associated risk and return levels. Updated clients on portfolio information changes; leverage Infusionsoft.
- Supported clients with rollover by processing documentation and connecting them with renowned custodian banks.

Financial Advisor Associate, AffleunceR Financial — 10/2017 – 06/2018

Facilitated holistic retirement consultancy for high-profile clients by assisting the financial advisor prepare business applications, coordinate paperwork for annuity contracts and RIAs, and renew insurance licenses at this retirement planning company; participated in advisor-client meetings. Reviewed investment applications and submitted them to insurance companies; tracked application processing through follow-ups. Prepared presentation decks and handouts for seminars.

- Eased financial plan construction and case and investment strategies designing for the advisor by analyzing Morningstar reports as well as critical client data, including financial, portfolio, and Social Security benefit statements.
- Updated clients on case status and communicated outstanding items to the financial advisor using Pipedrive and Redtail CRMs.
- Notified clients of their annual returns after assessing financial statements; created annual performance reports.

Advisory Operations Associate, Jackson National Life Insurance Company — 05/2017 – 09/2017

Ensured accurate reporting of customer accounts and billing and commissions to support financial advisors by overseeing daily accounts using CRMs, including Envestnet and WealthOne at this insurance company.

- Assured appropriate client account documentation by performing quality control checks to identify and remove discrepancies.
- Enabled timely investment application and transaction processing by communicating outstanding requirements to associates.
- Prepared and shared quarterly client performance reports with the mailing department for shipment.

Consulting Projects

Data Analyst, Unified Western Grocers Inc. 01/2017 – 03/2017

- Streamlined sales, price, and demand analysis for various grocery items by creating sales analytics reports in MS Excel; extracted data by using Nielsen and calling external grocery stores and warehouses.
- Helped determine regional product performance by creating pivot tables.

Business Analyst, Origin Consulting LLC 09/2016 – 12/2016

- Resolved 2500+ serious water billing issues for clients by performing root cause analyses. Gathered and analyzed monthly water usage data; leveraged Mueller Systems to extract missing billing information.
- Supported field representatives with re-commissioning or exchanging meters by communicating identified errors post analysis.
- Reduced erroneous late fee impact on customers after a 4-month invoice delay by creating installment-based payment plans in the Oracle Utilities Customer Care and Billing (CC&B) system.

Business Analyst, Super Power Consulting LLC 07/2015 – 02/2016

- Released $740K of the actual revenue by analyzing and resolving electric, water, and sewer billing exceptions.
- Helped remediate high-volume Oracle CC&B exceptions by rendering technical and operational support.
- Updated clients on recurring issues and presented viable solutions by compiling data and creating Excel-based reports.

Data Integrity Analyst, Ernst & Young LLP 01/2015 – 05/2015

- Aligned customer account information with the Office of Foreign Assets Control (OFAC) regulations to maintain compliance; audited customers' electronic documents; pinpointed and recommended elimination of non-compliant accounts.
- Prepared reports for the Fraud Investigation & Dispute Services team.

Education

MS in Economics (Financial Economics), California State Polytechnic University (Cal Poly Pomona) 2014
BS in Economics, University of Peshawar 2009

CFA Institute Certification: CIPM® Level I Candidate 2019
CFA Institute Certification: Investment Foundation Certificate 2015
FINRA Registration Series 6, 7, 65, & 66 Licensure (Willing to take)

And here's the resume he was using before he worked with us...

ANEES AYAZ, INVESTMENT CONSULTANT

Los Angeles, CA 91406 (818)966 3335 anees.ayaz87@yahoo.com. www.linkedin.com/in/anees-ayaz

~Experienced Investment Consultant with two years of experience working in the financial services industry

FINANCIAL SERVICES EXPERIENCE

Wahed Invest, LLC *October 2018 – Present*
Investment Consultant

- Develops a consultative relationship with new and existing clients through proactive call-outs, phone appointments, and product demos
- Collaborates with Marketing Manager and Vice President to develop a marketing plan and conducts presentations/seminars to potential clients detailing about the company's investment platform and services
- Assists clients in opening accounts and process transfer/rollover forms
- Serves as direct client contact and responsible for fulfilling any ad-hoc requests from clients

Affluencer Financial *October 2017 – June 2018*
Financial Advisor Associate

- Reviewed investment applications for completeness and submitted to respective outside companies
- Followed up with outside companies regularly to track processing progress and sent case status updates to clients
- Reported to financial advisor in person and via CRM system to make sure that case status and outstanding items are communicated
- Created reports for financial advisor as requested and sent annual reports to clients letting them know of their investment results using their statements
- Assisted financial advisors in the presentation of investment allocation plans, case design/investment strategies, and other financial planning engagements
- Maintained client information files and interaction updates in the CRM systems

Jackson National Life Insurance Company *May 2017 – September 2017*
Advisory Operations Associate

- Processed daily account maintenance on proprietary platforms to ensure customer accounts, billing, and commissions are accurately reported
- Ensured all appropriate account documentation are obtained and performed quality control checks on account establishments to resolve discrepancies
- Ensured transactions are in 'good order' for processing and communicated with internal and external associates regarding outstanding requirements of an application or a transaction
- Assisted with the quarterly performance report mailing and other administrative projects as needed

CONSULTING PROJECTS

Unified Western Grocers, Inc. *January 2017 – March 2017*
Data Analyst

- Assisted in the development of and creation of reports based on the analytical framework as established by the Consumer Analytics and Scan Advantage team
- Created in-depth general sales analytics reports in Microsoft Excel and reported to the manager, procurement, space management, and sales team

Origin Consulting, LLC. *September 2016 – December 2016*
Business Analyst

- Performed root cause analysis by categorizing billing errors and provided actionable recommendations to ensure that these errors do not recur in the future
- Provided an analysis report to the client to determine additional field works needed so that field representatives can appropriately re-commission meter or exchange them
- Created robust payment arrangements options in the Oracle CC&B system for customers based on their newly billed charges to ensure minimum customer impact

Sure Power Consulting, LLC. *July 2015 – February 2016*
Business Analyst

- Provided technical and operational support in remediating high volume CC&B exceptions to support the post-implementation of Oracle Utilities Customer Care and Billing (CC&B) system for the client
- Analyzed bill exceptions related to electric, water, and sewer usage in Oracle CC&B system and released $737,698 of actual revenue

It only talked about his responsibilities and lacked critical keywords....

- Proactively generated ideas for improvement in the strategic plan by compiling data and created reports in Microsoft Excel for the project team

Ernst & Young, LLP. *January 2015 – May 2015*
Data Integrity Analyst

- Assisted the client in remediating customer information to make sure accounts abide the Office of Foreign Assets Control (OFAC) regulations and provided recommendations to the client in terminating accounts
- Reconciled information between systems to ensure accuracy and integrity of the information and recognized potential audit issues from analysis of customer documentation
- Used Microsoft Excel to compile information and prepared reports for the Bank Personnel and Fraud Investigation & Dispute Services team

EDUCATION

California State Polytechnic University (Cal Poly Pomona) Pomona, CA
Master of Science in Economics (Financial Economics) *2014*

University of Peshawar Peshawar, Pakistan
Bachelor of Science in Economics *2009*

Investment Foundations Certificate Los Angeles, CA
CFA Institute *2015*

ADDITIONNAL INFORMATION

Skills:
Envestnet, FIS Integrated Banking Services, Microsoft Office (Excel, Word, Outlook, PowerPoint), Pipedrive, Infusionsoft, Pershing, Redtail, Statistical Package for the Social Sciences

Interests:
Discovering new restaurants, hiking mountain trails in Los Angeles, surfing, learning new systems