

ASIF KHAN

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CAREER SUMMARY

Accomplished Financial Services Professional with proven ability in client acquisition, financial risk management, and customer service seeking a position at a Financial Institution. Effective at working with business owners from experience with startups. Experienced as a broker in: Stocks, Bonds, Options, Futures, Commodities, and Foreign Exchange.

SOFTWARE SKILLS

- Bloomberg Terminal
- Monte Carlo Simulation - @RISK
- IBM SPSS Statistical Software 25
- Microsoft Office: Excel, PowerPoint, Word
- Customer Relations Manager – Salesforce
- QuickBooks; Chase Paymentech

LICENSES

- SIE & Series 6, 7, 63, 65, 3 – Exams Passed on 1st Attempt (CRD #6724180).
- FL 2-15 (Life, Health, Variable Contracts) and Long-Term Care.

PROFESSIONAL EXPERIENCE

Spine Sport & All Facets of Rehab Center, INC

August 2017 – Present

Accountant / Office Manager

Kissimmee, FL

- Negotiated contract with insurance providers to improved collections by 25%.
- Registered startup as S-Corp, setup payroll, and created retirement plan.
- Establish framework for bill processing to allow for same day health insurance billing.
- Balanced budget and financed equipment purchase to maintain positive cash flow.
- Designed webpage and created marketing materials.
- Secured contract for both AdventHealth and HCA's Osceola Regional Medical Center.

New York Life

March 2018 – December 2018

Financial Services Professional

Orlando, FL

- Improved marketing methods and pitch for monthly increase in new business.
- Serviced existing clients, most of whom were business owners, by meeting with CPAs.
- Conducted portfolio analysis with risk return suitability to improve client returns.
- Created organized financial reports for clients leading to increased client satisfaction.

MassMutual Financial Group

February 2017 – March 2018

Registered Representative

Miami, FL

- Initiated collaboration with 4 different brokers to increase client acquisition by 22%.
- Planned marketing strategy for office managers to increase 403(b) plan enrollments.
- Managed retirement investment accounts: Traditional IRA, Roth IRA, SEP IRA.

Prudential Financial**October 2016 – February 2017**

Financial Professional Associate

Coral Gables, FL

- Enhanced client portfolio suitability using risk analysis through Monte Carlo Simulation.
- Created detailed reports on Life Insurance & Investment Strategies.

Best Buy**May 2015 – July 2016**

Apple Master / Sales Consultant

Miami, FL

- Established protocol for pitching Apple product use by cross-promoting other products.
- Accomplished 17% annual increase in Geek Squad & Apple Care insurance sales.
- Provided customers product recommendation via value proposition raising sales by 20%.

University of Miami Dept of Information Technology**January 2015 – May 2015**

User Assistant

Coral Gables, FL

- Provided customer service to students by educating them in relevant software.
- Enhanced lab space experience: enforced policies, monitored lab space, and took calls.

EDUCATION**Florida International University - College of Business****August 2015 – December 2016**

Master of Science in Finance (MSF) & MBA, Dual Degree

Miami, FL

GPA: 3.780

MBA: Corporate Finance, Marketing, Organizational Information Systems, Global Financial Strategy, Operations Management.**MS in Finance:** Quantitative Methods in Statistics, Advance Risk Management, Financial Markets, Securities Analysis, Portfolio Management.**University of Miami - College of Arts and Science****August 2011 – May 2015**

Bachelor of Science in Psychology

Coral Gables, FL

Relevant Courses: Advanced Research Methods, Macroeconomics, Computer Programming.

HONORS & AWARDS

- New York Life GOLD Trigger award for multiple large cases.
- 1st Place – FIU International MBA Corporate Simulation.
- FIU Master Project: Venture Capital Start-Up Business Plan.
- Bloomberg Market Concepts.
- Bloomberg Essentials: Securities, Fixed Income, FX, Commodities.
- edX Certified: Analyzing and Visualizing Data with Excel.
- FBLA Florida Chapter - 4th in Management Decision Making (Orlando, FL).
- FBLA District 52 - 2nd in Management Decision Making (Miami, FL).

MEMBERSHIPS: Wall Street Journal Young Professionals Network.**LANGUAGES:** English, Spanish, Hindi.