

TRE' GARRISON

Financial Analyst

301-906-8344



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Baltimore, MD



SUMMARY

Highly Motivated and organized professional Financial Analyst with over 8 years of experience providing detail oriented assignments. As well as experience initiating team supervision and motivation while maintaining quality and integrity. Highly devoted to detail, positivity, and organizational progression through work performance and exhibition.

EDUCATION

University Of Maryland

Bachelor's Degree of Arts- Finance
2010-2015

SKILLS

- Strong organizational and time-management skills
- Exceptional communication and interpersonal skills
- Data Management
- Ability to work independently and as part of a team
- Detail-oriented and able to handle multiple tasks simultaneously
- Project Oversight/Management
- Wealth Planning
- Experience in managing budgets and handling financial documents
- Sharepoint Site Experience
- Microsoft Excel/ Word/ Powerpoint

PROFESSIONAL EXPERIENCE

Financial Planner

Capital One Bank | May 2018 - Present

- Provides financial planning, insurance, and investment services.
- Evaluates client's complete financial expectations to understand and devise a financial plan.
- Works with supporting staff to establish and maintain client's files
- Maintain ongoing relationships with clients to keep them updated on any financial changes
- Acts as a liaison to insurance provider and other financial professionals
- Handle confidential information and documents with discretion and maintain their proper organization
- Implement risk management and tax planning strategies

Warehouse Supervisor

The Home Depot | 2015-2018

- Managing, evaluating and reporting on warehouse productivity
- Review timeliness of scheduled deliveries.
- Maintaining records, reporting relevant information, and preparing any necessary documentation.
- Tracked inventory levels.
- Coordinating and maintaining fleets and equipment.
- Analyzed shipment logs.
- Ensuring basic maintenance standards and compliance with health and safety regulations.

Account Executive

Capital Remodeling | 2017-2018

- Created detailed business plans to reach forecasted goals and quotas.
- Managed the entire sales cycle from finding a potential client to securing a deal.
- Unearthed new sales opportunities through networking.
- Turned new sales opportunities into long-term partnerships.
- Presented products to prospective clients.