



Michael Davis

Finance Administrative Assistant

Proactive finance administrative assistant with six years of experience supporting financial advisors and analysts. Skilled in report preparation, account reconciliation, and client communication. Known for maintaining accuracy and confidentiality in sensitive financial environments.

CONTACT



(123) 456-7890



email@example.com



LinkedIn | Portfolio



San Francisco, CA 94103

EDUCATION

Bachelor of Science (B.S.) in Finance
University of San Francisco, San Francisco, CA
June 2015

KEY SKILLS

- Account reconciliation
- Client communication
- Financial reporting
- Microsoft Excel
- Scheduling

PROFESSIONAL EXPERIENCE

- **Finance Administrative Assistant, Golden Gate Financial, San Francisco, CA**
February 2017 – Present
 - Prepared monthly financial reports and budgets for review by senior analysts, achieving 100% on-time delivery
 - Reconcile client accounts, resolving discrepancies and ensuring compliance with financial regulations
 - Schedule client meetings and prepare supporting materials, increasing client retention by 15%
- **Office Assistant, Summit Wealth Advisors, San Francisco, CA**
June 2015 – January 2017
 - Assisted in preparing investment reports and maintaining financial records
 - Supported customer service by handling client inquiries and managing follow-up communications

CERTIFICATIONS

- **Certified Financial Administrative Professional, Financial Office Institute, May 2019**