DAVALE ARNOLD

Financial Planner | Business Relationship Management | Project Management | Client Satisfaction

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SUMMARY

Results-driven financial planning professional with 3 years of experience in business relationship management and project oversight. Proven expertise in financial planning, client engagement, and strategic marketing. Successfully grew client portfolio by 25% through targeted initiatives and led the execution of 50+ real estate transactions in 2024.

EXPERIENCE

Realtor Intern

ReMax

08/2024 - Present Mansfield, TX

- Increased client conversion by {20%} by organizing impactful home showings and thorough inspection review.
- Improved sales efficiency by {30%} by providing innovative pre-purchase solutions in the home buying process.
- Built robust relationships resulting in {15%} client retention increase by engaging with new and existing customers.
- Processed {2000} customer records monthly by efficiently managing CRM data entries for enhanced customer experience.

Summer Intern

Guy Rodgers Private Wealth Strategies

05/2022 - 01/2023 Mansfield, TX

- Improved client data accuracy by updating {100%} entries in contact management system.
- Facilitated client meetings by preparing {10} detailed reports.
- Enhanced portfolio performance by implementing tailored retirement strategies.
- Increased clients' financial goal attainment by {20%} through strategic financial monitoring and advice.

Inventory Specialist

Broad spectrum

05/2020 - 08/2021 Dallas, TX

- Managed {$50,000} worth of stock and supplies to ensure organized stock areas.
- Maintained {$5,000} of stock and displays on retail floor.
- Improved staff relations by conducting {10} team-building activities.
- Maintained {99%} accuracy in inventory and shipping records.
- Maintained accurate inventory and shipping records.
- Relocated {1,000} units safely for timely stocking using pallet jacks.
- Ensured {100%} product availability by accurate inventory management.
- Facilitated {200} customer interactions for locating and transferring oversized items.
- Enhanced team communication leading to {20%} increase in task efficiency.
- Informed management of {5} safety concerns by applying safety procedures.
- Provided detailed product info to answer {300} customer queries.

EDUCATION

Bachelors of Business Administration with an emphasis in Financial Planning

University of North Texas

05/2024 Denton, Texas

CERTIFICATION

Emoney Wealth Management Certification

University of North Texas

Microsoft Excel Certification

University of North Texas

STRENGTHS

Relationship management prowess

Skilled in developing and nurturing professional business relationships.

Financial planning expertise

Adept in strategizing to enhance clients' financial objectives.

Project management experience

Proven ability to lead and manage successful projects.

CRM system proficiency

Expert in using CRM systems for efficient data management.

KEY ACHIEVEMENTS

Client Portfolio Growth

Increased client portfolio by 25% through strategic marketing initiatives in 2024.

Successful Transaction Closure

Managed and closed over 50 real estate transactions successfully in 2024.

Client Satisfaction Excellence

Achieved 95% client satisfaction rate in 2023 with proactive follow-ups and responsiveness.

Inventory Discrepancy Reduction

Reduced inventory discrepancies by 30% in 2021 through improved tracking systems.

Sales Efficiency Increase

Improved sales efficiency by 30% via innovative pre-purchase solutions.

Client Conversion Rise

Increased client conversion by 20% with impactful home showings.

SKILLS

Financial Planning & Analysis
Investment Management
Retirement Planning
Tax Planning
Estate Planning
Insurance Planning
Risk Management
Budget & Cash Flow Management
Wealth Management
Regulatory Compliance
SEC
FINRA
CFP Board Regulations
Communication & Presentation skills
Relationship Building
Negotiation Skills
Attention to Detail
Emotional Intelligence
Problem-Solving
Ethical Decision-Making
Financial Modeling & Forecasting
CRM Software
Portfolio Management Tools
Morningstar
Bloomberg Terminal
Orion
Tax Software
Turbotax
Drake
Lacerte
Microsoft Office Tools
Google Workspace
AI & Automation in Finance

KEY ACHIEVEMENTS

Customer Records Management
Processed 2000 customer records monthly for enhanced CRM experience.

Inventory Accuracy Achievement
Maintained 99% accuracy in inventory and shipping records.

REFERENCES

Availble upon request