





# MD

# Michael Davis

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
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## 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 I 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 I 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, January 2019