David Beckham

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Core Competencies

- Client Relations
- Japanese Candle Stick Charts
- Technical Analysis
- Chart Patterns
- Investment Theory
- Thompson Reuters
- Bloomberg
- Client Services
- Process Improvement
- MS Word Expert
- MS Excel Expert
- Pivot Tables
- VLookups and API
- PowerPoint Expert
- Client Retention
- Multi-tasking
- Finance
- HF Operations
- Risk Management
- Reconciliations
- Trade Confirmations
- Research
- Follow up
- Troubleshooting
- Communication
- Proposal Books
- Teamwork
- Needs Analysis
- Reviewing Accounts
- Problem solving
- Listening
- Verifying Trades
- Account Management
- Strong Work Ethic
- Positive Attitude
- Banking
- Bank Operations
- Trading Operations
- Quick Books
- Due Diligence
- Investments
- Asset Allocation
- Written Communication
- Training

Investment Analyst ▪ Annuity Sales ▪ Retirement Planner

Professional Experience

Investment Analyst, Investments Trade Operations 9/07 to present
TD Ameritrade, Securities Services, New York, NY

- Maintained safe client portfolio risk practices through a range of verification procedures within accepted risk tolerances.
- Liaised with fund administrators, IT managers, investor services and custodians to resolve portfolio issues.
- Gave approval of broker recommendations, asset allocation, diversification and risk management strategy for clients.
- Handled the redemption, transfer and audit requests. Prioritized the execution of time sensitive trades.

Annuity Sales, Retirement Planning Group 5/03 to 9/07
Guaranteed Life Insurance Co. Inc., Long Island, NY

- Prepared custom financial strategies for clients including investment, annuity and insurance products. *President's Club Member three times.*
- Created PowerPoint sales presentations based on asset allocation and risk tolerance to present info clearly. Trained three top producers.
- Learned effective marketing and prospecting strategies to target more affluent clientele. *First in sales three times in entire state of New York.*

Client Services, Global Private Client Division 10/02 to 5/03
Goldman Sachs, Manhattan, NY

- Reviewed clients' investment account performance relative to the financial markets and major indices.
- Performed account and risk analysis to support broker's investment views.
- Created customized client proposal books for prospective wealthy investors.

Clerk, Accounting Department 5/02 to 9/02
Oglivy & Oglivy, New York, NY (a marketing and promotions company)

- Used QuickBooks and managed accounts receivable, accounts payable, bank reconciliation and client inquires. Worked with clients and vendors to maintain consistent and accurate accounting records.

Office Associate, Sales Department 1/00 to 5/02
Staples, Boston, MA

- Supported all clients in busy office supply retailer, resolved client complaints, and satisfied inquiries. Part time while studying for college.

Education ▪ Certifications ▪ Professional Development

Bachelor of Science, Business Administration, Major – Finance,
The Harvard University, Cambridge, MA 2002
MBA, Harvard University, Cambridge, MA 2008

- Rhodes Scholar graduated on full academic scholarship 4.0 GPA
- Certified in Bloomberg for Equities (investment research platform)
- Certified in Technical Analysis for Institutional Portfolios, NAIP
- Certified in Japanese Candle Stick Chart Analysis, NAIP
- Hold current Life, Health and Disability Insurance Producer license from the state of New York and have 3300 current clients.