

Chase Dapello

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OBJECTIVE: To obtain a finance internship where I can apply my hard work, skills and learning ability to a trusted financial organization. My courses in communication, finance, and analytics; combined with my professional development at a previous advisory position has prepared me with the knowledge and skills you are looking for in a top candidate.

QUALIFICATIONS SUMMARY:

- Graduated with honors from California Lutheran University
- Investment Advisor managing around \$75 Million in assets
- SIE, Series 7, Series 66, Notary Public, and life insurance designations
- Excellent interpersonal and team communication skills
- Problem solver

EDUCATION:

California Lutheran University; Thousand Oaks, CA

Major: Business Administration, emphasis in Finance; Bachelor of Science, May 2020

WORK EXPERIENCE:

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|---------------------------|-------------------|--------------------|
| Union Bank of Switzerland | Thousand Oaks, CA | Feb 2017- Aug 2018 |
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Financial Advisor Internship

- Participated in research, loading bonds, and other tasks on ongoing basis
- Organized financial Advisor's schedule, including meetings and events
- Assisted with client interactions
- Received mentoring in financial advice and stock research

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|------------------------------------|----------------------|-------------------|
| Westlake Private Wealth Management | Westlake Village, CA | Jun 2019- Present |
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Financial Advisor

- Client management and hospitality
- Investment planning
- Asset and risk management
- Education planning
- Budgeting and savings guidance
- Tax strategies
- Insurance analysis
- Banking and lending services

REFERENCES: Available upon request

ACCOMPLISHMENTS:

Certified investment advisor, CFP candidate, NextGen Rotary board member