**Chase Dapello**

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Simi Valley, CA 93063

Phone: (805)-210-0823

Email: chase.dapello@westlakepwm.com

March 21, 2019

Dear ------,

I am writing to apply for the. I have a strong aptitude for client communication, problem-solving, and the ability to take initiative while staying positive and progressive to accomplish my goals. I believe these traits coupled with my work and education experience can bring value to your established group of planners.

 I understand that you are looking for someone who can help with client interactions as well as other support duties. I also noted that candidates working towards a degree in Business Finance with a GPA over 3.2 is a top priority. I am currently working towards my Finance degree at California Lutheran University and feel that my courses in advanced communications and finance, combined with my experience working at high-stake client focused positions, have prepared me with the knowledge and skills you are looking for in a top candidate. In researching Goldstein & Associates I noted that trust, customer service, and customer loyalty are very important to you. My experience working at Union Bank of Switzerland in Thousand Oaks gave me the hands-on experience in representing an organization with a high degree of trust and customer service, in which I developed a sense of professionalism that can be attributed to that environment.

Overall, I feel that my natural determination and passion for learning, excellent communication skills, and knack for numbers will serve me well as your Financial Planning Intern. Being a member of California Lutheran’s student body, I have developed a hardened work ethic and track record of ethical behavior. I hope to have the opportunity to demonstrate all of these characteristics in your organization.

My resume is attached with this cover letter. I would love the opportunity to talk in-depth about this position in an interview. You can reach me at either my email, dapello@callutheran.edu or on my cell phone, (805)-210-0823 between the hours of 3 to 8 pm. Thank you for your time, and I look forward to hearing from you.

Sincerely,

Chase Dapello

**Chase Dapello**

Phone: (805)-210-0823

Email: chase.dapello@westlakepwm.com

LinkedIn: [http://www.linkedin.com/in/ chase-dapello-046231173](http://www.linkedin.com/in/%20chase-dapello-046231173)

 **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:**

Union Bank of Switzerland Thousand Oaks, CA Feb 2017- Aug 2018

**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

Westlake Private Wealth Management Westlake Village, CA Jun 2019- Present

**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

**ACCOMPISHMENTS:**

**Certified investment advisor, CFP candidate, NextGen Rotary board member**