

Roxy Puschel

Asset Management
Analyst

Details

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125 Oak Street, Wichita, KS 67202

Profile

Dedicated Asset Management Analyst with 1 year of experience in supporting asset management processes, including data analysis, financial modeling, and reporting. Possesses strong analytical and problem-solving skills, with a keen focus on maximizing investment performance. Adept at collaborating with cross-functional teams and leveraging financial tools to optimize portfolio management. Demonstrated ability to adapt quickly to new tasks and thrive in fast-paced environments.

Employment History

Asset Management Analyst at Intrust Bank, KS

May 2023 - Present

- Successfully managed a portfolio of over \$500 million in assets, resulting in a 15% increase in revenue for Intrust Bank, KS within two years.
- Streamlined the asset allocation process by developing and implementing a new risk assessment model, reducing overall portfolio volatility by 8%.
- Identified and executed investment strategies that outperformed benchmarks by an average of 3% annually, contributing to the growth of the bank's assets under management.
- Conducted comprehensive financial analysis on over 50 potential investment opportunities, leading to the successful acquisition of 10 new high-performing assets worth \$75 million.

Associate Asset Management Analyst at Mariner Wealth Advisors, KS

Jul 2022 - Apr 2023

- Successfully managed a portfolio of over \$50 million, achieving an average annual return of 7% over a two-year period, leading to increased client satisfaction and retention rates.
 - Conducted comprehensive risk assessments for over 200 clients, resulting in a 15% reduction in overall portfolio risk and a 10% increase in diversification for clients' investments.
 - Streamlined internal reporting processes, reducing time spent on creating quarterly reports by 20%, allowing the team to focus more on client relationships and strategic investment planning.
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Education

Bachelor of Business Administration in Finance and Asset Management at Kansas State University, Manhattan, KS

Sep 2018 - May 2022

Relevant Coursework: Financial Accounting, Managerial Accounting, Corporate Finance, Investment Analysis, Financial Risk Management,