

# Carleta Lauria

Financial Assistant

## Profile

Financial Assistant with 1 year of experience providing comprehensive support in financial operations, analysis, and reporting. Proficient in managing accounts payable and receivable, reconciling financial discrepancies, and preparing accurate financial statements. Adept at utilizing financial software, streamlining processes, and contributing to effective financial decision-making. Demonstrates strong analytical skills, attention to detail, and commitment to maintaining confidentiality and compliance with regulatory standards.

## Employment History

### Financial Assistant at Edward Jones, NE

Feb 2023 - Present

- Successfully managed a portfolio of over 100 clients, resulting in a 15% increase in assets under management within one year.
- Streamlined the financial reporting process, reducing the time spent on monthly reports by 30% and improving overall accuracy.
- Assisted in the implementation of a new client relationship management system, leading to a 20% improvement in client satisfaction scores within six months.

### Junior Financial Assistant at Ameritas Financial Services, NE

Jul 2022 - Dec 2022

- Successfully managed a portfolio of over 50 clients, resulting in a 20% increase in customer satisfaction and 15% growth in revenue for the company within the first year.
- Streamlined financial reporting processes, reducing the time spent on monthly financial statements by 30% and improving overall accuracy by 10%.
- Implemented a new budgeting system that led to a 25% reduction in expenses and helped the company save over \$100,000 annually.

## Certificates

### Certified Financial Planner (CFP)

Nov 2021

### Chartered Financial Analyst (CFA)

Feb 2020

## Memberships

✉ [carleta.lauria@gmail.com](mailto:carleta.lauria@gmail.com)

☎ (746) 800-4584

📍 123 Elm Street, Lincoln, NE 68508

## Education

### Associate of Applied Science in Finance at Metropolitan Community College, Omaha, NE

Sep 2018 - May 2022

Relevant Coursework: Financial Accounting, Managerial Accounting, Macroeconomics, Microeconomics, Business Mathematics, Financial Management, Risk Management, Personal Finance, Investments, and Financial Planning.

## Links

[linkedin.com/in/carletalauria](https://www.linkedin.com/in/carletalauria)

## Skills

QuickBooks

Excel

Budgeting

Forecasting

Reconciliation

Payroll

Invoicing

## Languages

English

Japanese