

# Johnelle Porcayo

## Financial Associate

Results-driven Financial Associate with 1 year of experience in the finance industry. Proficient in financial analysis, budgeting, and forecasting. Demonstrated ability to streamline processes, enhance efficiency, and contribute to company growth. Strong analytical and problem-solving skills, coupled with excellent communication and interpersonal abilities. Adept at managing multiple priorities and meeting tight deadlines. Committed to continuous improvement and professional development.

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## Education

**Bachelor of Science in  
Finance at Texas A&M  
University, College Station,  
TX**

Aug 2017 - May 2022

Relevant Coursework: Financial Accounting, Managerial Accounting, Corporate Finance, Investment Analysis, Financial Markets and Institutions, Risk Management, Financial Statement Analysis, Portfolio Management, International Finance, and Financial Planning.

## Links

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

## Skills

QuickBooks



Excel



Financial modeling



Risk assessment



Portfolio management



Bloomberg Terminal



Data analysis



## Employment History

### Financial Associate at Merrill Lynch, TX

Feb 2023 - Present

- Successfully managed a portfolio of over \$50 million in assets for high-net-worth clients, resulting in a 15% increase in overall client satisfaction and retention rates.
- Streamlined the financial analysis process by implementing new software tools and methodologies, leading to a 25% reduction in time spent on financial modeling and risk assessments.
- Played a key role in securing a \$10 million deal with a major institutional client by conducting thorough due diligence and presenting a comprehensive investment strategy, contributing to a 7% increase in the firm's annual revenue.

### Junior Financial Associate at Charles Schwab, TX

Jul 2022 - Dec 2022

- Successfully managed a portfolio of over \$50 million in assets for high-net-worth clients, resulting in a 12% increase in portfolio value within one year.
- Streamlined the financial reporting process by implementing a new software, reducing the time spent on quarterly report generation by 30%.
- Assisted in acquiring 25 new clients with a combined total of \$10 million in investable assets, contributing to a 15% growth in the firm's client base.

## Certificates

### Chartered Financial Analyst (CFA)

Jun 2021

### Certified Financial Planner (CFP)

Aug 2019

## Memberships

Chartered Financial Analyst (CFA) Institute

Financial Planning Association (FPA)