Catheryn Sharkus

Financial Planner

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(373) 216-3667
123 Main Street, Boston, MA 02110

EDUCATION

Bachelor of Science in Finance at Boston College, Chestnut Hill, MA
Aug 2018 - 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 Modeling.

LINKS

linkedin.com/in/catherynsharkus

SKILLS

- Budgeting
- Risk assessment
- Tax planning
- Investment strategies
- Retirement planning
- Estate planning
- Debt management

LANGUAGES

- English
- Japanese

HOBBIES

PROFILE

Financial Planner with 1 year of experience in providing strategic financial guidance to clients, including budgeting, investment planning, and risk management. Proficient in analyzing client financial situations, developing tailored plans to meet short and long-term goals, and monitoring progress. Adept in enhancing client satisfaction and building long-lasting relationships through excellent communication and interpersonal skills. Demonstrates a strong commitment to staying current with industry regulations, trends, and best practices to ensure accurate and informed advice.

EMPLOYMENT HISTORY

Financial Planner at Commonwealth Financial Group, MA
May 2023 - Present

- Successfully managed a diverse portfolio of over $50 million in assets for high-net-worth clients, resulting in an average annual return of 8% over a 5-year period.
- Implemented tax-efficient investment strategies for clients, leading to an average annual tax savings of $15,000 per client and significantly improving their overall financial positions.
- Spearheaded the development and launch of a comprehensive financial education program for young professionals, attracting over 300 new clients to Commonwealth Financial Group within the first year.
- Consistently exceeded new business development targets, bringing in an average of $10 million in new assets under management each year and contributing to a 20% annual growth rate for the firm.

Associate Financial Planner at Baystate Financial, MA
Sep 2022 - Apr 2023

- Successfully managed a portfolio of over $50 million in assets for high-net-worth clients, resulting in an average annual return of 12% and contributing to the company's overall growth.
- Implemented a new client onboarding process that increased efficiency by 25% and led to a 15% increase in client retention rate within the first year of implementation.
- Conducted comprehensive financial analyses for over 150 clients, identifying opportunities for wealth optimization and tax savings, ultimately saving clients an estimated $1.5 million in taxes during my tenure at Baystate Financial.

CERTIFICATES

Certified Financial Planner (CFP)
Nov 2021

Chartered Financial Consultant (ChFC)
Jul 2020

MEMBERSHIPS