

Kateri Troccoli

Securities Analyst

Diligent Securities Analyst with 1 year of experience in conducting in-depth financial analysis, evaluating investment opportunities, and delivering market insights. Proficient in financial modeling and risk assessment, with a strong understanding of equity and fixed-income investments. Demonstrated ability to work collaboratively in a team environment and present data-driven recommendations to support investment decisions. Committed to continuous professional growth and staying current with industry trends.

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1234 Evergreen Lane, Seattle, WA 98101 

Education

Bachelor of Science in Finance and Investment Analysis at University of Washington, Seattle, WA

Sep 2017 - May 2022

Relevant Coursework: Financial Accounting, Managerial Accounting, Microeconomics, Macroeconomics, Corporate Finance, Financial Statement Analysis, Investment Analysis, Portfolio Management, Financial Markets, Risk Management, Financial Modeling, and International Finance.

Links

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

Skills

Financial Modeling

Bloomberg Terminal

Risk Assessment

Data Analysis

Excel Proficiency

Equity Valuation

Portfolio Management

Employment History

Senior Securities Analyst at Morgan Stanley Wealth Management, WA

May 2023 - Present

- Successfully identified and recommended a portfolio of high-performing securities that generated a 15% return on investment for clients within one year, outperforming the industry benchmark by 5%.
- Conducted in-depth analysis of over 200 companies across various sectors, leading to the acquisition of 10 promising stocks that increased our clients' portfolio value by \$2 million within two years.
- Developed and implemented an innovative risk assessment model that reduced portfolio volatility by 20%, enabling clients to minimize potential losses while maintaining consistent returns.
- Collaborated with a team of analysts to create an investment strategy for a high-net-worth client that resulted in a 25% increase in their assets under management within 18 months, contributing to the overall growth of Morgan Stanley Wealth Management's AUM by 10%.

Junior Securities Analyst at Edward Jones, WA

Aug 2022 - Mar 2023

- Successfully analyzed and recommended a portfolio of 10 securities, resulting in an overall return of 15% for clients in the first year.
- Conducted in-depth research on over 50 companies across various industries, contributing to the development of comprehensive investment strategies that outperformed market benchmarks by 8%.
- Streamlined the research process, implementing new data analysis tools that improved efficiency by 25% and reduced time spent on manual tasks by 20 hours per week.

Certificates

Chartered Financial Analyst (CFA)

Sep 2021

Certificate in Investment Performance Measurement (CIPM)

Jun 2020