

# SARAH J. PARKER

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Financial Planning graduate with good academic track record and strong people/relationship building skills from 4yrs customer service experience. Excited to build a career in Financial Planning, I bring well-developed skills in the following:

- Xplan (Financial Planning Software)
- Excellent communication, interpersonal and listening skills
- Capability to explain complex information simple and clearly
- Ability to network and establish relationships with client
- Strong multitasker and highly organized
- Good negotiation and presentation skills

## EDUCATION

**2017-2019**

**BACHELOR OF COMMERCE, GRIFFITH UNIVERSITY**

Major: Financial Planning

Results: GPA 6.2 (Scale 1-7, 7 being highest)

Key Courses:

- Financial Planning (High Distinction)
- Risk Management and Insurance (Credit)
- Retirement and Estate Planning (Credit)
- Portfolio Management (Credit)
- Government-Business Relations (High Distinction)
- Financial Planning, Construction and Review (Credit)

Projects/Case Studies

### **2019 SOA Construction & Presentation**

- Prepared Statement of advice by developing strategies for each goal
- Analysed client needs and selected the right insurance and superannuation product, utilising Xplan
- Recommended the strategies for wealth creation and wealth protection
- Discussed why strategies are chosen based on benefit, risks and implications
- Fulfilled the requirement of RG146
- Communicated effectively with the clients and confidently presented their Statement of Advice

### **2018 Portfolio Construction**

- Identified 20 Stocks to match investment style, with 8 having the potential to outperform over the investment horizon
- Constructed an efficient portfolio by formulating the minimum variance portfolio weights

### **2018 Strategy Report**

- Illustrated introduction to the case client providing a clear overview of the goals and summary of strategic response
- Demonstrated balanced and very high level of detailed knowledge of Wealth Creation/Retirement Planning concepts
- Prepared report including clear steps to achieve client objectives, benefits and outlined associated risks, clarifying alternatives & decision-making factors

### **2018 Risk Management Strategy**

- Demonstrated the importance of insurance as part of a personal risk and management plan - provided set of objectives for the client
- Analyzed and selected the right insurance policy, utilizing Xplan
- Prepared report including detailed and focused summary of the product recommendations consistent client preferences and customized to client need

## **EXPERIENCE**

**5/2016 – CURRENT**

### **SUPERVISOR, FOOD & BEVERAGE, NEXT HOTEL GROUP**

- Trained & supervised over 15 staff – most became valued F&B team members
- Customer Service – ensured high level of satisfaction, promptly addressed concerns & effectively managed complaints
- Closed & balanced register at end of shift
- Managed stock to ensure fresh supplies available

*Trusted staff member, reputation for good ability to manage customers and efficient F&B operations. Promoted to supervisor after one year.*

## **COMMUNITY ACTIVITIES**

### **ADMIN SUPPORT OFFICER VOLUNTEER, RED CROSS**

- General administration duties- Microsoft Office applications
- Created & managed accurate client and volunteer information on databases
- Maintained confidentiality
- Supported projects demonstrating effective communication, good customer service
- Worked independently and in a team
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## **REFERENCES**

Available on Request