ROSARIO CHACON

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SUMMARY OF QUALIFICATIONS

- Finance specialist with proven record growing client base and revenues in a start-up environment and Fortune 500 Company.
- More than 8 years' experience in Finance and Management positions with demonstrated successful execution of operations, marketing, sales, and business development functions.
- Licensed Financial Advisor who leads with planning analysis, increasing the client's awareness of needs, wants and wishes.

PROFESSIONAL EXPERIENCE

MORGAN STANLEY — **Public Company; 10,001+ employees; MS; Financial Services Company**

Financial Adviser — **Pleasanton** — **Oct. 2014 – Feb. 2016**

- Understands specific situation, establishes objectives, and develops tailored strategy to reach goals and objectives of client.
- Communicates complex information to client about his or her choices and provides assessment and merits of alternatives.
- Promotes financial literacy through seminars to various audiences including retirees to community organizations.

APOYO FINANCIERO — **Private Company; 42 employees; Micro-lending Industry**

Branch Manager — **San Francisco Bay Area** — **June 2008 – May 2013**

- Key member of management team that achieved profitability in less than one year.
- Grew portfolio from $617,000 to $2.9 million, and 1023 active clients within 35 months in the first branch in S. Francisco.
- Implemented strategies that helped company grow by 150% during existing economic crisis.
- Set up and managed newly formed Oakland branch; grew portfolio $0 to $2,000,000 in the first 17 months of operations.
- Managed all aspects of daily sales, marketing, and operations, including hiring, training, and coaching staff.
- Assigned back to original branch to innovate collection strategies; lowered from 8% to near 5% default rate in 4 months.

CITIBANK — **Public Company; 10,001+ employees, Citigroup subsidiary; C; Banking**

Financial Analyst — **Oakland** — **Oct. 2006 – June 2008**

- Achieved a 14% reduction in customer attrition by providing excellent customer service.
- Led financial workshops in the community that resulted in 20% growth in small business accounts for branch in 6 months.
- Developed client investment portfolios through analysis of their personal finances.

COMMUNITY OPTIONS — **Non-Profit; Supports and advocates for youth with disabilities**

Assistant Manager — **Oakland** — **Sept. 2005 – Sept. 2006**

- Supervised all aspects of daily operations and programming, including hiring, training, and scheduling clients and staff.
- Facilitated meetings with doctors and guardians in order to customize a personal and career development plan for clients.
- Ensured contracts were in compliance with state regulations.
- Administered program budget and expenditures.

SKILLS

- Licenses: Series 7, Series 66, Life and Health Insurance.
- Multilingual: English, native Spanish and Maya speaker, intermediate French.
- MS Office: Word, Excel, Outlook, PowerPoint, and Access. OneView (equivalent to MoneyGuide) planning software.
- Excellent oral and written communication skills; solid relationship-building and emotional intelligence.

COMMUNITY INVOLVEMENT

NSHMBA	**National Society of Hispanic MBAs**	
Treasurer	**San Jose**	**2015 – Present**
FPA	**Financial Planning Association**	
Member	**San Francisco Bay Area**	**2016 – Present**
CHAN KAHAL	**Mayan Cultural Association**	
Founder and Board Member	**San Rafael**	**2003 – 2007**

EDUCATION

C.F.P. Certification Candidate	UC Berkeley	Present
M.B.A. in Finance	Mills College	2007
B.A. in Business Economics	Mills College	2006