

Thuy Hoang

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Experienced Associate Banker at JPMorgan Chase, providing personalized banking support and exceptional customer service. Previous roles strengthened expertise in financial advising, sales, and client engagement. Committed to delivering quality under high-pressure environments.

Education

Master of Science Financial Analytics
California State University, Long Beach

Expected: August 2026

Bachelor of Arts in Business Administration Finance
California State University, Fullerton

August 2024

Associate of Arts Business Administration
Orange Coast College

June 2022

Work Experience

Associate Banker
JPMorgan Chase

October 2024 – Present

- Advise dozens of clients weekly on banking solutions and personalized financial strategies, strengthening long-term relationships and contributing to higher client satisfaction scores.
- Facilitate seamless account management and complex transactions in a high-volume branch, ensuring accuracy and compliance with regulatory standards.
- Deliver exceptional customer service by addressing client needs promptly, helping retain clients in a competitive market and boosting referral rates.
- Streamline teller transaction processes by introducing efficiency improvements, processing 2,000+ transactions monthly while reducing client wait times by 25–50%.

Financial Representative
Modern Woodmen of America

June 2024 – October 2024

- Cultivated and managed a portfolio of 3 client relationships by providing personalized financial guidance, resulting in stronger client trust and repeat engagements.
- Advised clients on a range of financial products and services, aligning solutions with long-term goals to support retirement planning and wealth management.
- Enhanced sales and customer engagement skills through prospecting, client consultations, and follow-ups.

Academic Projects

Detailed quantitative analysis of a company

July 2024

- Built advanced spreadsheet models to analyze financial statements, calculate key ratios, forecast cash flows, and produce valuation scenarios under base, optimistic, and downside cases.

Skills

Technical: Microsoft Word, PowerPoint, Advanced Excel, Python, Linux systems, Large Language Model usage, AI tools, data visualization, predictive analytics, information systems

Financial: Capital markets knowledge, financial instruments analysis, market research and trend evaluation, sales support and client relationship management, financial services industry expertise, analytical problem-solving, effective written and verbal communication, teamwork.

Languages: Vietnamese (Fluent).