



JESSE MARTIN

New York, NY 10005
email@example.com
(000) 000-0000

Finance Executive Assistant

Executive Assistant with 9 years of experience supporting CFOs and finance teams at investment firms and financial institutions

Specializes in managing financial reports, coordinating investor meetings, and keeping executive operations aligned with compliance requirements.

Education

Bachelor of Science (B.S.) in
Finance | May 2014
Baruch College, New York, NY

Key Skills

- Budget coordination
- Compliance prep
- Earnings calendar support
- Financial reporting
- Investor meeting planning
- Regulatory documentation
- Scheduling

Professional Experience

Executive Assistant

ClearBrook Investments, New York, NY | April 2017 - Present

- Schedules investor calls, due diligence meetings, and quarterly earnings reviews for CFO and finance partners
- Assists with compliance documentation and prepares monthly financial reports for internal and external stakeholders
- Coordinates internal planning sessions during annual budgeting and audit cycles

Administrative Associate

Greenrock Capital, New York, NY | July 2014 - March 2017

- Supported portfolio analysts and finance directors with calendaring, email follow-ups, and compliance deadlines
- Built templates for earnings summaries and investor snapshots
- Maintained CRM entries and coordinated industry event attendance

Certifications

- Financial Office Support Certificate | Wall Street Admin Training | May 2018