

Jushun Mahabali

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EXPERIENCE

Fidelity Bank Investments, Walnut Creek CA - Investment Center Intern

June 2023 - August 2023

- Demonstrated proactive communication skills by initiating over 50 outbound calls daily and composing numerous strategic emails.
- Streamlined appointment management for multiple financial advisors, reducing scheduling conflicts by 20% and increasing overall efficiency.
- Collaborated closely with internal teams to streamline document processing and ensure compliance with regulatory standards, enhancing operational efficiency.
- Assisted financial advisors in connecting prospecting clients to managerial services, resulting in an estimated 10% increase in client acquisition rates.

Irving Fisher Private Wealth Management, Hercules CA - Finance Intern

June 2020 - May 2022

- Researched Tech Landscapes: Conducted in-depth market research, translating analytical skills to tech landscapes for informed decision-making.
- Optimized Solutions in Challenges: Analyzed portfolio diversification amid the pandemic, applying strategic thinking to optimize tech solutions in dynamic environments.
- Mitigated Risks Collaboratively: Assessed gains/losses in volatile markets with a team, transferring teamwork skills to identify vulnerabilities and manage risks

PROJECTS

Creative Learning Artistic Support (CLAS) Squad, Technology Support Manager

August 2018 - May 2022

- Led tech literacy programs for underserved youth, collaborating seamlessly with educators and parents.
- Quickly adapted platforms during the pandemic, maintaining clear communication and professionalism.
- Delivered customized training modules, enhancing software proficiency while upholding a professional approach.

EDUCATION

San Jose State University - Business: Management and Information Systems

May 2024

SKILLS

Public Speaking & Communication

Microsoft Office | Google Workspace

Experienced with CRMs

Experienced with Cold Calls/Email

Adaptable & Goal Oriented

Research & PowerPoint Presentations