

Bella Holt

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Education

Iowa State University,
Bachelor of Science in Financial Counseling and Planning
Track: Family Financial Planning
Dean's List

Ames, IA
May 2019
3.7 /4.0 GPA
Fall 2016, Spring 2017 & Fall 2017

Skills

o Excel (VBA) o PowerPoint o Microsoft Word o Microsoft Office o Typing o Writing Legal Briefs o ICAN FASA Certification

Relevant Experience

Investing for the Family Future (HDFS 583)

- Overview of investment markets for households
- Analytical coursework on planning & budgeting for family savings
- Principals of investing for a family's financial and economic goals.

Personal and Family Finance (HDFS 283)

- Intro to principals of personal and family finance.
- Examined budgeting and investment methods.
- Reviewed consumer credit, taxes, and insurance.

Experience

IBM
Rochester, MN

December 2017 - June 2018
Financial Analyst (Co-op Position)

- Constructed and restored Excel macros that automated and verified contractual data for financial reporting usage.
- Generated efficiency and accuracy in forecasting duties by 75% with automation and revision of financial reports.
- Monitored the current performance and predicted future value of multiple business units based on data from a block-chained, financial ledger system for IBM business executives budgeting review.

Transamerica
Cedar Rapids, IA

June 2017 - December 2017
Retirement Account Specialist

- Advised and communicated the effects and ramifications of initiated withdrawals, account loans, rollovers, and portfolio tax processes in retirement accounts to clients.
- Delivered solutions and information to clients, advisors, and plan managers tailored to each retirement account.
- Resolved a wide variety of issues from website portal usage to portfolio returns by verbally communicated the best advisable solution for every client's situation.
- Recognized for communication, caring, teamwork and detail-oriented work with three Dedication & Effort awards.

Pearson
Iowa City, IA

February 2015 - July 2015
Technical Support Call Center Representative

- Achieved a 100-point quality monitored review out of an expected 85 point throughout position, recognized for the longest, consistent highest scorer within the call center.
- Produced results for multiple issues from project site passwords, website usage, personal computer issues, IT solutions, and software malfunctions, all while ensuring customer satisfaction.
- Maintained accurate and detailed records of all call inquires while multitasking between phone and online chat communication.