

## **Sample Chronological-Functional Format**

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### **SUMMARY**

A track record of outstanding performance in Trust and Investment banking. Successful management of both personal and institutional portfolios with total values close to one billion dollars. An adept analyst of such diverse industries as energy, metals, insurance, banking and electrical. A high-energy, results-oriented manager looking for the next challenge.

### **OBJECTIVE**

An opportunity for a banking professional whose successful loss control/profit preservation approach to portfolio management can make a meaningful contribution.

### **CAREER HIGHLIGHTS**

- **Managed a broadly diversified account base of over 395 accounts with a total value in excess of \$955 million.**
- **Improved performance of accounts, shortened turn-around time for investment reviews by 25%, thereby cementing relations with clients.**
- **Developed effective computerized methods for rapid analysis of investment diversification.**
- **Upgraded and expanded professional staff of twelve.**

***Senior Portfolio Manager***, June 2000- October 2004  
Broad National Trust Company, Summit, New Jersey

Developed an innovative computerized method for rapid analysis of investment diversification. Reduced time spent in review analysis by 25% while improving review quality. Reduced turnaround time on investment reviews by 30%. Programs consistently outperformed the S&P index for four years running.

***Portfolio Manager***, August 1996- May 2000  
Morgan Guaranty, New York, New York

Initially recruited as a Senior Investment Analyst. Promoted to Portfolio Manager in 10 months. Hired, trained and supervised twelve additional analysts in related research coverage. Dramatically reduced energy stock holdings in October, 1999 which produced sizable capital gains while avoiding the sell-off that followed. Instituted new software for staff which increased potential investment opportunities by 21%.

### **EDUCATION**

Columbia Business School, MBA, Finance and Marketing  
Rutgers University, MA, BA, Economics

## **SHELLY FISHER**

1105 Poseidon St.  
Northridge, CA 91330  
805 555-8051

[shellfish@watermark.com](mailto:shellfish@watermark.com)

### **OBJECTIVE**

A position in marine biology

### **EDUCATION**

California State University-Northridge, Northridge, CA  
*Bachelor of Science Degree in Marine Biology, 2005*

University of Washington, Seattle, WA  
*Summer research work, Washington Institute of Marine Biology, 2003 and 2004*

### **RELATED EXPERIENCE**

#### **Marine Biology**

- Researched and collected data for a two week study on Santa Cruz Island
- Investigated existence and population of invertebrae in Morro Bay
- Gained thorough knowledge of identification of marine species during summer studies at Washington Institute of Marine Biology. Successfully completed the following projects:
  - Reconstructed the bone skeletons of 21 marine fish and mammals
  - Prepared study skins of four species of marine birds

#### **Demonstrated Organizational Skills**

- Ability to coordinate and write marine biology research projects
- Can design studies that involve locating species and accurately measure quantity
- Can provide microscopic photographs to support animal behavior studies

#### **Professional Capabilities**

- Highly organized and conscientious with a positive attitude
- Able to handle multiple assignments under high pressure and consistently meet tight deadlines
- Thrive on working in a challenging environment
- Possess excellent written, oral and interpersonal communication skills

### **EMPLOYMENT HISTORY**

Norita's Corner Store, Los Angeles, CA, *Cashier*, June, 2005-present  
Mackes Aircraft, El Segundo, CA, *Documentation Clerk*, summers: 2001 and 2002