

Mustafa Hasani

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EDUCATION

B.S. in Finance

Jan 2025- May 2027

University of Texas at Dallas

Richardson, TX

- Activities & Societies: Financial Leadership Association

Coursework Towards B.S. in Finance

Aug 2023 – Dec 2024

Collin College GPA: 3.82/4.0

Plano, TX

- Activities & Societies: Phi Theta Kappa Honor Society, NexGen Consulting, Math Club, Business Club

WORK EXPERIENCE

Fisher Investments

Nov. 2023 – Current

Finance and Operations Junior Associate

Plano, TX

- Facilitated portfolio analysis of financial data for high net-worth clients, ensuring precision and promptness in information delivery, contributing to a 50% increase in data accuracy and economic insights.
- Processed 15+ cost-basis requests weekly, optimizing operations in the Portfolio Accounting group by 60%.
- Earned Junior Associate of the Year among 80+ JAs, recognized for outstanding performance and metrics.
- Assisted Financial Planning Counselors in developing daily data projections using MoneyGuidePro to create annual comprehensive retirement plans for over 700 clients, incorporating Monte Carlo analysis for accuracy.
- Utilized Microsoft Excel and PowerPoint to develop data projections for Investment Counselors, enhancing client engagement and supporting relationship management efforts, contributing to stronger client retention.

Morphis Inc.

Jan. 2021 – Sep. 2022

Sales and Marketing Intern

Dallas, TX

- Supported sales operations utilizing Excel and CRM software for lead management, resulting in \$84,000 in client contracts, while contributing to a 113 % increase in online engagement through marketing campaigns.
- Analyzed seven financial statements, assisting in compiling yearly income statement and balance sheet data.
- Represented the company at trade shows, increasing in-person engagement and booth traffic by 13%.
- Collaborated with the finance team to forecast quarterly sales targets, improving accuracy by 10%.

Heal360

Sept. 2022 – Dec 2022

Administrative Assistant

Plano, TX

- Provided administrative support to the billing department, processing invoices and ensuring timely resolution of billing discrepancies, contributing to a 15% improvement in client satisfaction ratings.

DiscoverSTEM

Jan. 2022 – Sept. 2022

Student Mentor

Plano, TX

- Mentored at an innovation facility, contributing to 8 processed patents while being nationally recognized.

ACADEMIC PROJECTS

NexGen Consulting

Oct. 2023 – Dec. 2024

Founder/President

Plano, TX

- Founded a club to help economically disadvantaged individuals gain real-world experience by facilitating workshops with industry professionals, organizing networking events, and hosting consulting competitions.
- Executed social media consulting projects for three companies, increasing average online traffic by 95 %.

AWARDS & ACCOMPLISHMENTS

- Awards:** FI Junior Associate of the Year, Eagle Scout, DECA Financial Services International Qualifier
- Patents:** Automatic Sun Visor [US20230061443A1](#), Hydration Monitoring System [ZA202303468B](#)

ADDITIONAL INFORMATION

- Skills:** Microsoft Excel, PowerPoint, Salesforce, Iris, Tableau, Citrix, Suitability Wizard, DCF Models, SQL, MoneyGuidePro, DocuSign, QuickBooks, Financial Management, Data Analysis, Financial Modeling
- Languages:** English, Urdu, Hindi, Arabic
- Interests:** Running Marathons, Skiing, Flying Drones, Blogging, Backpacking, Playing Golf, NFL Sundays