

Sunny Middleton

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Passionate about empowering women to attain financial independence. Focused on assisting young individuals in achieving their full potential at the earliest stages of their lives. Additionally, I strive to support people from all walks of life in reaching their financial aspirations and securing a prosperous future.

EDUCATION

B.S. in Business Administration; Personal Financial Planning

Future CFP Candidate

EXPERIENCE

Capstone Project

- Developed a holistic financial plan to ensure long-term stability and growth.
- Recommended health, life, auto, and homeowners insurance.
- Provided guidance on managing and refinancing loans and mortgages.
- Conducted ratio analysis to evaluate financial health.
- Prepared tax strategies to optimize liabilities.
- Advised on savings, investments, and stock portfolios.

Server | The Melting Pot | Pita Jungle | 2020-2024

- Resolved customer complaints effectively, showcasing strong problem-solving skills and calmness under pressure.
- Enhanced communication skills through daily interactions with a diverse clientele.

LEADERSHIP

Varsity Collegiate Athlete

2019-2023

- Demonstrated Coachability: Actively sought and applied feedback from coaches and teammates to improve performance and contribute to team success.
- Continuous Improvement: Engaged in regular self-assessment and goal-setting with coaches to enhance skills and performance.
- Team Collaboration: Worked closely with coaches and team members to develop strategies and improve team dynamics, leading to winning seasons.

Residents Assistant

Seminole State College

July 2019-May 2021

- Created a sense of community while assisting in crises and referring students to appropriate services.
- Prioritized many ongoing projects and worked in a creative and dynamic environment.

SKILLS

- Adaptability: Experience in international travel and adapting to diverse environments. Quick adaptation to new coaching styles and strategies with demonstrated flexibility and willingness to learn and grow.
- Financial Analysis: Proficient in evaluating financial strategies, investment vehicles and portfolio/asset allocation.
- Client Service: Strong commitment to providing world-class client service with excellent communication and interpersonal skills.
- Analytical Thinking: Adept at problem-solving and applying innovative solutions to financial challenges.
- Technical Proficiency: Microsoft Office Suite, Google Workspace.
- Leadership: Mentoring new team members and fostering a supportive and cohesive team environment.