

Daniel Matthew Pucci

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Professional Summary

Motivated Business Finance student seeking an entry-level Financial Professional role in a remote environment. Strong interest in financial planning, client education, and long-term relationship building. Known for integrity, coachability, and a strong work ethic, with a desire to grow through training into leadership and management roles within the financial services industry.

Core Competencies

Client Communication • Financial Education • Goal-Based Planning • Relationship Building • Time Management • Ethical Decision-Making • Independent Work • Sales Fundamentals • Professional Follow-Through

Experience

Operations Intern — KHR McNeely Fund, Sonoma, CA (August 2024 – May 2025)

- Supported daily office operations, record organization, and internal workflows
- Reviewed financial and written information for accuracy and completeness
- Demonstrated professionalism, discretion, and reliability in a regulated office environment
- Assisted with internal process improvements and administrative support

Summer Camp Leader — Hanna Center, Sonoma, CA (Summers 2022–2023)

- Built trust-based relationships with families and staff through clear communication
- Led groups of 65+ individuals, developing confidence and leadership skills
- Managed responsibilities independently while meeting daily performance expectations
- Maintained accountability, safety, and professionalism at all times

Education

University of Nevada, Reno

Bachelor of Science in Business Finance (In Progress)

Expected Graduation: 2029

Additional Information

- Finance student with strong interest in retirement, investment, and college planning
- Willing to complete required licensing and continuing education
- Authorized to work in the United States
- Comfortable working remotely and managing a flexible schedule