Jared Koberstein

Finance & Banking Professional | Business Admin Graduate

Personal information

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Summary

Business administration graduate with a finance concentration and more than 10 years of U.S. Air Force and Air National Guard experience leading teams, managing operational resources, reviewing performance data, and serving internal customers. Completed two eight-week Amplified Planning financial planning externships involving simulated client analysis, planning deliverables, and observation of advisor meetings. Brings disciplined documentation, clear communication, and analytical problem-solving to entry-level finance, banking, financial operations, and client service roles.

Keywords

Financial analysis | Banking operations | Client service | Cash flow analysis | Financial planning | Data analysis | Risk assessment | Documentation | Team leadership

Professional experience

Financial Planning Extern (two eight-week externships) *June 2026 - August 2026*

Amplified Planning | Remote

Completed two structured eight-week externships using simulated client cases and observation of practicing advisors. Reviewed household cash flow, net worth, investments, taxes, education funding, insurance, retirement, and estate considerations; developed planning summaries and prioritized action items from case materials. Observed virtual discovery and review meetings, with attention to client communication, documentation, and translating goals into next steps. Practiced with eMoney, Morningstar Advisor Workstation, Asset-Map, and Redtail CRM to organize case information and support planning analysis. Work was educational and did not involve independently advising or serving clients.

Business or sector: Financial planning education

HVAC Team Lead / Noncommissioned Officer *January 2014 - Present*

U.S. Air Force and Air National Guard | Florida and other duty stations

Led and trained a team of five technicians; assigned work, tracked schedules and equipment readiness, and maintained accurate records under strict operating standards. Reviewed maintenance and performance data to identify discrepancies, prioritize resources, and improve scheduling and equipment reliability. Coordinated projects, suppliers, and internal customers while meeting deadlines and resource constraints. Supported hurricane response operations and other mission-critical assignments; earned multiple achievement awards and an early promotion for performance.

Business or sector: Military operations

Education and training

Bachelor of Arts in Business Administration, Finance Concentration *May 2023 - November 2025*

Keiser University | Sarasota, FL

Graduated magna cum laude, November 2025. Relevant coursework: Financial Management, Financial Decision Making, Investments, Financial Policy and Strategy, Management Information Systems.

CFP Certification Education Coursework *November 2025 - Present*

Dalton Education

In progress; began November 2025. Education coursework, not CFP certification.

Personal skills

Communication skills

Client meeting observation; clear written summaries and action items; stakeholder and supplier communication; coaching and training.

Organisational / managerial skills

Team leadership; schedule and resource coordination; documentation; quality control; compliance-oriented work.

Job-related skills

Financial statement and cash flow analysis; retirement, investment, tax, insurance, education, and estate planning concepts; simulated client case analysis; report writing; operational performance review.

Digital skills

eMoney, Morningstar Advisor Workstation, Asset-Map, and Redtail CRM (externship exposure); RightCapital, Holistiplan, and Nitrogen (planning-tool exposure).

Further information

Honours and awards

- **Military achievement awards and early promotion**
  Recognized for operational leadership, response efforts, and sustained performance.