

MISAGH KHATERI

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WORK EXPERIENCE

Associate Banker / J.P. Morgan Chase, San Francisco, CA

September 2024 – PRESENT

- Provides tailored financial solutions by engaging clients in meaningful conversations about their banking needs.
- Supports branch operations by assisting with teller transactions, including deposits, withdrawals, and payments, ensuring accuracy and efficiency.
- Proactively educates customers on digital banking tools to enhance their banking experience and streamline account management.
- Collaborates with the banking team to identify and refer opportunities for personal and business financial growth.
- Ensures compliance with regulatory requirements and internal policies, maintaining a secure and professional environment.
- Delivers exceptional service by addressing customer inquiries and resolving issues promptly, fostering trust and satisfaction.

Territory Sales Manager / Envision Bay Consulting – AT&T, San Francisco, CA

July 2024 – September 2024

- Lead business-to-business sales pitching of AT&T products (phone lines, internet air and fiber, and Direct TV) for regional AT&T sales campaign
- Processing various orders using SARA+ order processing system
- Individualized calculation of plans and service costs for each customer including promo eligibility
- Building client relationships and establishing trust with customers using multiple sales methods and showcasing credibility of knowledge of the products
- Resolving customer questions and concerns efficiently

Co-Founder, Financial and Investment Manager, Lecturer / HighPeak Academy, Isfahan, Iran

January 2020 – January 2024

- Led private and public technical and fundamental market analysis courses for over 60 students.
- Established and led a dynamic executive team, driving strategic growth initiatives.
- Engineered online marketing campaigns and optimized company website, resulting in increased student enrollment.
- Oversaw a multifaceted team of six professionals, coordinating activities and ensuring seamless operations.
- Managed financial transactions, including AR, AP, and payroll processing using Parsian Accounting software.
- Achieved an average of 20% gain monthly in a brokerage account, crafting tailored investment portfolios for clients.
- Spearheaded strategic business planning and negotiations with the parent company, fostering sustainable partnerships and revenue growth.

Bookkeeper / Sara Food Hall Chain Restaurants, Isfahan, Iran

May 2018 – January 2020

- Restored accounting systems and organized account records using Parsian accounting software following sudden staff departure.
- Ensured compliance with tax and legal regulations
- Created financial reports of sales, income, and expenses across multiple restaurants for both legal compliance and for business management to assess projected profits

Inventory Accountant / Coroma Electronic and Home Improvement Supplies Firm, Isfahan, Iran

December 2017 – May 2018

- Managed inventory transactions and produced weekly inflow and outflow reports using Holoo accounting

software and Microsoft Excel.

- Conducted research and made strategic investments in electronic and home improvement goods.
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SKILLS AND EXPERTISE

Soft Skills: Adaptability, Collaboration, Leadership, Negotiation, Problem-solving, Client Care

Hard Skills: Banking, SWIFT transactions, Financial Market Analysis, Instruction, Financial Statements and Reports, Client Portfolios, Brokering, Consulting, Budgeting and Forecasting

Software Proficiency: SWIFT, SARA Plus OPS, Microsoft Office Suite (Excel, PowerPoint, Word, Outlook), QuickBooks, Parsian, Holo, Slack, Adobe Suite, Monday.com, Teamwork, TradingView.

EDUCATION

Bachelor of Science, Accounting / Islamic Azad University of Esfahan, Isfahan, Iran

Certificate of Technical and Fundamental Analysis / Iran Technical and Vocational Training Organization, Isfahan, Iran
