sofiajimenezp@hotmail.com

PROFILE

Business Administration and Economics. I have 2 years of experience in the financial sector, with a strong interest in the commercial and investment areas. I consider myself a responsible and organized person, proactive, persistent, and results-oriented. I have had the opportunity to work in various areas within the investment world, which has given me a comprehensive vision of the sector. I have stood out for my collaborative attitude, commitment, and ability to quickly adapt. I am seeking to continue developing my career and take on new challenges

WORK EXPERIENCE

2023- Present
INSTITUCIONAL AREA – MBI INVERSIONES S.A
Institucional Client Analyst
Responsible for generating investment ideas, preparing commercial material for client distribution, and direct client communication. Also support in managing various businesses handled at the desk: structured notes, equity fund, and mandate management.

Jul 2022- Dec 2022
PORTFOLIO SOLUTIONS, WEALTH MANAGEMENT – BTG PACTUAL
Internship
Support in generating investment strategies implemented in mutual funds and managed portfolios, preparation of presentations, client reporting, committee participation, programming language projects, and meetings with international managers.

Mar 2021 – Jul 2022
FINANCE AND ACCOUNTING AREA – NEOKODE
Internship and Part-Time Job
Use of ERP systems, mainly in accounting, sales, purchasing, and billing modules. Support in accounting and data transfer to the software. Responsible for client collection and quotations

Aug 2021 – Dic 2021
MARKETING CONSULTING – RESIFAST
Created a strategic marketing plan and proposals with strengths and upcoming challenges.

Mar 2019 - Jul 2019
PROJECT ADVISOR - AUTOFACT
Created a feedback tool based on the organization of employee tasks and job positions.

EDUCATION

2025
REGISTERED TO TAKE CFA LEVEL I

2018 - 2022
UNIVERSIDAD DE CHILE, CHILE
Business Administration and Economics

2004 - 2017
COLEGIO SAGRADO CORAZÓN MONJAS INGLESAS, CHILE
Primary and Secondary Education

2021
TEACHING ASSISTANT- ECONOMICS FOR BUSINESS
Responsible for conducting tutorials and preparing exams for second-year university students on topics such as free competition, price discrimination, mergers, and financial economics.

ADDITIONAL INFORMATION

2021 – 2023
PRIVATE MATH TUTORING
Math classes for elementary and high school students

2017 - 2022
BABYSITTER

2018 - 2021
PROMOTER

2014 – 2018
VOLUNTEERING
Cultural Weeks: Organized activities for communities across various regions, especially for children.
Un Techo para Chile: Participated in the construction of homes throughout the country.

TECHNICAL SKILLS

Microsoft Office (Advanced), R Studio (Intermediate), SQL (Intermediate), Power BI (Intermediate), and good command of Bloomberg.

LANGUAGES

English (Business Level)