



Dexter Wallis

Financial Advisor

Profile

Experienced and driven Financial Advisor with over five years of experience providing clients with optimal assistance with retirement planning, estate planning, investment advice, tax strategies, and overall support managing their finances. Proven track record of competitive market share expansion and assisting corporations in reaching goals. Driven and detail-oriented with the ability to thrive in high pressure environments. Adept at developing key relationships and furthering business development.

Employment History

Financial Advisor at Goldman Sachs, New York

September 2013 — September 2019

- Developed and implemented new and improved financial policies based on extensive research findings.
- Fostered successful relationships with 250+ clients, providing them with top of the line financial advisement.
- Advised a total of \$40 million in assets.
- Mentored and trained new team members and worked collaboratively with existing members.

Financial Advisor at Bank of America, New York

August 2008 — August 2013

- Increased client satisfaction rating by 8% in my first year.
- Presented financial planning seminars to existing and prospective clients.
- Discovered undervalued investments and identified long term sustainable growth.
- Provided high quality investment guidance to clients based on their needs, goals, and lifestyle.
- Contributed to a productive and happy work environment, dedicated to the satisfaction of the client.

References

Brian Anderson from Bank of America

banderson@boa.com 212-777-4372

Louise Nelsen from Goldman Sachs

lnelsen@goldmansachs.com 212-552-2039

Education

Master of Finance, Columbia University, New York

August 2008 — August 2010

- Graduated with High Honors.

Details

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Skills

- Market Growth & Expansion
- Relationship Building
- Market Analysis
- Portfolio Management