

Robert Smith

Financial Professional

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SUMMARY

To gain valuable and relevant experience by obtaining a Financial Professional position within the fields of digital marketing, hopefully leading to future endeavors with firm.

SKILLS

Sales, business development, customer service, relationship management, personnel management, public speaking.

WORK EXPERIENCE

Financial Professional

ABC Corporation - April 2013 - July 2016

- Conducts detailed financial analysis for clients and made recommendations based on clients needs.
- Maintains and regularly updates detailed files on clients according to company and FINRA standards.
- Performs good order reviews of required forms and legal documents.
- Processes market sensitive financial transactions accurately and address and resolve outstanding good order requirements with third-party Financial Advisors and Prudential Agents.
- Effectively communicates (via letter or phone) responses and reasoning concerning the inquiries to the involved parties.
- Proactively identifies improvement opportunities and recommends solutions, track and trend processing errors, and provide detail feedback to clients.
- Develops and cultivates relationships with an affluent, finance-savvy client base.

Financial Professional

Delta Corporation - 2008 - 2013

- Financial Services Professional Managed clients assets & Investment portfolios Acquired my Series 6 and Series 63 license Assisted in training of new .
- Financial Services Institutions; providing a range of insurance, investment and retirement services for individuals, families and businesses CURTIS D.
- Consulted clients to determine their financial needs and investment objectives.
- Educated clients about valuable retirement benefits and tax laws.
- Built and maintained client bases, kept current clients up-to- date and prospect new clients on a on-going basis Conducted 403(B) seminars for .
- Closed contracts on financial products such as stocks, bonds, mutual funds and insurance.
- Conducted financial need analysis and recommend appropriate products to meet client needs Maintained client relationships Analyzed financial markets .

EDUCATION

Bachelors- (MILLERSVILLE UNIVERSITY - Millersville, PA)