FINANCIAL ADVISOR RESUME

Address Line 1 Address Line 2, City, State Zip * (212) 256-1414 * jane.smith@gmail.com

SUMMARY

Financial Advisor with 7+ years of experience delivering financial/investment advisory services to high value clients. Proven success in managing multi-million dollar portfolios, driving profitability, and increasing ROI through skillful strategic planning, fine-tuned consulting, and financial advisory services.

PROFESSIONAL EXPERIENCE

WELLS FARGO ADVISORS, Richmond, VA
Financial Advisor, August 2016–Present

- Deliver financial advice to clients, proposing strategies to achieve short- and long-term objectives for investments, insurance, business and estate planning with minimal risk
- Develop, review and optimize investment portfolios by serving 300+ high value clients and over $190M AUM (Assets Under Management)
- Ensure maximum client satisfaction by providing exceptional and personalized service to each client, enhancing client satisfaction ratings from 88% to 99.9%
- Work closely with specialists in multiple branches, managing investment portfolios for over 800 clients with over $25M in assets under care
- Design and implement templates of internal financial reports and dashboards for operational departments which increased profits by 40%

SUNTRUST INVESTMENT SERVICES, INC., Charlottesville, VA
Financial Advisor, July 2013–August 2016

- Served as knowledgeable financial advisor to clients, managing over $20.75M investment portfolio of 90+ individual and corporate clients
- Created investment/asset allocation models and proposed strategies to capitalize on market, risk, and insurance opportunities.
- Devised and applied a new training and accountability program that increased productivity from #10 to #3 in the region within less than 2 year period
- Partnered with cross-functional teams in consulting with clients to provide asset management risk strategy and mitigation which increased AUM by 50%
- Developed new Business by cultivating solid relationships with clients, increasing the number of high-worth clients by 30%

EDUCATION

RIVER BROOK UNIVERSITY, Chicago, IL
Bachelor of Science in Business Administration (concentration: finance), July 2013

- Honors: *cum laude* (GPA: 3.6/4.0)

ADDITIONAL SKILLS

- Proficient in MS Office (Word, Excel, PowerPoint) Outlook, MS Project, Salesforce, TFS Project Management, Webex, and GoTo Meeting
- Bilingual in Spanish and English