Sara Amirez

Wealth Management Advisor

CONTACT DETAILS

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Cincinnati, OH

LinkedIn

Portfolio

CORE SKILLS

- GAFM Chartered Wealth Manager
- SEC Member
- High-Value Asset Management
- Portfolio Coordination
- Client Aquisition
- Third Party Liaison
- Private & Public Banking

PROFESSIONAL PROFILE

Chartered Wealth Management Advisor with a sucessful 20-year career providing investement advice and asset management services for clients at leading US bank, including Morgan Stanley and Trex Bank. Strategic SEC-certified financial planner currently managing a client portfolio worth over $26 million with demonstrated skill in client aquisiton and revenue growth. Adept at developing and delivering personalised financial management plans and liaising with third party organisations with large professional networks in Ohio and New York.

CAREER SUMMARY

Feb 2016 - Present **Trex Bank, Cincinatti, OH**
Wealth Management Advisor

Outline

Provide personalized wealth management services and advice to customers of leading US bank, Trex Bank, managing a portfolio of 103 clients with collective assets of $26 million.

Key Responsibilities

- Develop and maintain relationships with affluent clients to stimulate portfolio growth and avoid customer loss
- Maintain regular contact with clients by phone and email, arranging in person meetings where necessary
- Conduct evaluations of new customers to ascertain their investment needs, current capital, and personal preferences
- Identify and explain which financial products and/or services would be appropriate for each client and their unique circumstances
- Facilitate the delivery of strategies and capabilities including portfolio management, trust administration, investment advisory, and insurance
- Deliver comprehensive economic and market views, investment strategy, and fund security research
- Conduct portfolio construction resulting in tailored investment management and insurance services
- Refer and collaborate with other financial services as appropriate
- Work as part of a team of advisors to continually improve services, share resources, and advise on investement strategy
- Keep an accurate and up-to-date awareness of the US and global financial market, legislation, and stock market activity

Key Achievements

- Grew my client portfolio by 15% in my first year of employment, exceeding the average employee increase by half and generating $750K profit for the company.