Marcus Trescothick

Financial Advisor

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Summary

A highly motivated and enthusiastic management professional with many years of international experience in various corporate roles with the different multinational firm specially with a high level of ethical and professional standards; whose career objective is to be with an organization which is highly competitive in the market and to enhance professional skills in finance, which helps to take more job responsibilities, that benefits both the firm as well as self.

WORK EXPERIENCE

2012-08 - PRESENT

Financial Advisor
Kelly Services

- Building and maintaining a client base, through regular prospecting.
- Keeping current client up-to-date and seek out new clients on the ongoing basis.
- Obtaining current and accurate data from the prospective client in order to identify and propose the best solutions relevant to their current circumstances and portfolio.
- Using appropriate software.
- Presenting financial and protection planning recommendations to clients.
- Preparing and interpreting for clients various information such as investment performance reports, financial document summaries, and income projections.
- Ensuring that all application requirements are accurately and fully completed in order to meet regulatory and company requirements.
- Conducting regular reviews of client's circumstances to ensure current policies continue to meet their needs and to identify additional opportunities.
- Maintaining positive relations with all team members.
- Submitting activity and ad hoc reports to management as and when requested.

2009-08 - 2012-07

Financial Advisor
BMO Financial Group

- Listened, analyzed and provided guidance to team members and clients to address unique and challenged situations, resulted in optimal decision-making and client solutions.
- Helped clients psychologically navigate tumultuous economic climate to become more comfortable with investment strategy, based on their risk tolerance.
- Collaborated with other areas of the firm, including asset management, banking, consulting and investment banking, to meet client investment goals.
- Designed and implemented a new sales process.
- Mitigated risk and increased overall returns for clients through the design and implementation of new investment planning process.
- Managed optimization of sales and investment processes.
- Identified requirements and set goals that were clear, measurable and achievable.
- Created checklists, cross-checks and timeline for implementation.
- Communicated to stakeholders/clients the plan, timeline, and methods for evaluation.
- Identified threats and strategized contingency plans.
- Implemented the plan and monitor results, utilizing checklists and cross-checks.
- Developed controls to maintain improvements.
- Provided regular status updates regarding process results.
- Analyzed data to identify improvement opportunities.
- Identified lessons learned and integrated into future plans.
- Collaborated with other areas of the firm to meet client goals.

2007-02 - 2009-07

Junior Relationship Manager
Bank of Nova Scotia

- Generated new business to achieve defined sales targets.
- Contributed proactively towards the growth of Investment Services.
- Maintained a high standard of customer service in order to increase the Bank's