

FIRST NAME LAST NAME

Address | City | Zip | Phone | email

FINANCIAL PLANNER

Ambitious and goal-driven professional with a Bachelor Degree in Business Administration, Securities Course, and currently finishing Financial Planning Certificate from University Name. Over 13 years of customer service experience in post-secondary environments, with a proven history of developing and nurturing strong relationships with a diverse groups of clients. Offering robust analytical, research, and organizational skills coupled with a strong technical and methodical aptitude. Effective communicator who quickly builds trust and confidence when exchanging vital information across numerous departments and stakeholders to guarantee pinpoint accuracy. Aggressive in identifying and resolving inefficient processes and excelling in fast-paced environments with little supervision.

AREAS OF EXPERTISE

- Client Retention & Relations
- Investment Planning
- Portfolio Management
- Financial Analysis
- Securities Transactions & Sales
- Risk Assessment
- Data Management
- Customer Service
- Reporting & Documentation
- Records Management
- Leadership & Motivation
- Process Improvement

Computer Skills: Microsoft Office Suite | Cognos | SCT Banner | Lotus Notes | HTML | Databases

EDUCATION & CERTIFICATIONS

Institute Name– City

Financial Planning Certificate

Date

Relevant Coursework: Personal Financial Planning | Taxation Planning

Certificate Name

Date

Key Project: Developed a corporate social responsibility report for Company Name; performed detailed financial analysis, researched alternative energy options, reviewed operations and energy saving opportunities, and presented the report to the Director and Marketing Manager of Company Name

Degree Name

Date

Relevant Coursework: Investment & Risk Management | Integrated MIS | Macroeconomics | Strategic Management

Diploma in Business Management

Date

Relevant Coursework: Accounting | Mathematics of Finance | Technical Reporting

Leadership Associate Certificate

Date

Certificate in Human Resources

Date

Institute Name

Derivatives Fundamentals

Date

Options Licensing

Date

Securities Course

Date

RELEVANT EXPERIENCE

Title | Company Name – City

Date

- Acquired, fostered, and maintained client relationships; advised prospective clients through cold calling

Key Achievements:

- ✓ Performed 100+ calls every 4-hour day and achieved a great success rate
- ✓ Streamlined the potential client list by introducing excel spreadsheets