

Name Surname

Address
Phone Number
E-mail

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, consulting, and financial advisory services.

PROFESSIONAL EXPERIENCE

WELLS FARGO ADVISORS,

Senior Financial Advisor

Houston, TX

August 2020–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 for 300+ high value clients with over \$190M AUM (Assets Under Management)
- Ensure maximum client satisfaction by providing exceptional and personalized service, enhancing client satisfaction ratings from 88% to 99.9% in less than 6 months
- Work closely with specialists from multiple branches, managing investment portfolios for over 800 clients with over \$25M in assets under care

SUNTRUST INVESTMENT SERVICES, INC.

Financial Advisor

New Orleans, LA

July 2017–August 2020

- Served as knowledgeable financial advisor to clients, managing an over \$20.75M investment portfolio of 90+ individual and corporate clients
- Devised and applied a new training and accountability program that increased productivity from #10 to #3 in the region in 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%

MAVERICK CAPITAL MANAGEMENT

Financial Advisor

New Orleans, LA

July 2014–August 2017

- Served as the primary point of contact for over 15 clients
- Managed the portfolios of several major clients with over \$8.5M in total assets

EDUCATION

LOUISIANA STATE UNIVERSITY

Bachelor of Science in Business Administration (concentration: finance),
Honors: cum laude (GPA: 3.7/4.0)

Baton Rouge, LA

May 2014

ADDITIONAL SKILLS

- Proficient in MS Office (Word, Excel, PowerPoint) Outlook, MS Project, Salesforce, TFS Project Management
- Fluent in English, Spanish, and French

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EMPLOYMENT HISTORY

Food Service Worker

Billabong Restaurant

Broomfield, CO

June 2011 – Present

Worked under the immediate supervision of the School Food Service Manager. Performed routine manual tasks in the preparation and serving of food and in cleaning and maintaining food service areas.

Major Accomplishments

- Memorized the restaurants wine stock and the meals they should accompany, leading to daily wine sales averaging \$170, which was a 25% than company average.
- Write patrons' food orders on slips, memorize orders, or enter into handhelds for transmittal to the kitchen staff in a 120+ seat restaurant.

Trainee Food Service Worker

Woody's, Scottsdale, AZ

Scottsdale, AZ

January 2008 – May 2011

Coordinated and assisted in serving guests. I was responsible and in charge of the team of waitresses. In this role I trained several new employees up to standard.

Major Accomplishment

- Present menus to patrons and answer questions about menu items, making recommendations upon request in a 70+ seat restaurant.
- Served food and beverages to patrons, and prepared or server specialty dishes at tables required.

Secretary/Administrative Assistant

Raymond Pool Systems

Butte, MT

July 2005 – November 2007

Scheduled and coordinated appointments and events for supervisors. Entered client information and financial data into computer system.

Major Accomplishment

- Implemented a off-the-shelve CRM system, saving the company \$45,000 in the first year of use.

EDUCATION HISTORY

Broomfield Business College, Broomfield, MT

Associate of Science in Administrative Assisting

Name Surname

PROFESSIONAL TITLE

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Objective

To obtain a challenging data scientist position in a dynamic and innovative organization where I can use my technical and analytical skills.

Experience

FlueroGen Data Scientist	20XX – 20XX
<ul style="list-style-type: none">Increased customer retention by 20%Reduced fraudulent charges by 50%Improved product recommendations and increased salesDrove business decisions and reduced operational costs	

Pantheros Labs Junior Data Scientist	20XX – 20XX
<ul style="list-style-type: none">Cleaned and preprocessed dataConducted statistical tests for decision supportDeveloped machine learning models for predictionCollaborated on A/B tests, increased click-through	

Education

Jasper University, MS Data Science	20XX
Major: Data Science Minor: Machine Learning	

Bellows College, BS Mathematics	20XX
Major: Mathematics Minor: Computer Science	

Skills & abilities

- Management
- Problem solving
- Communication
- Leadership

Resume Template

PERSONAL DETAILS

Name	Damien Le Grand
Address	143 Maine ave, New York, new York 10026, United States
Telephone	890-545-0401
E-mail	email@email.com
Nationality	American
Driver's licence	Full

PROFILE

Certified electrician with 5 years of residential and industrial experience. Focused on diagnosis, repair and installation of customized and integrated light and audio systems. Passionate about training and mentoring others on the work sites I work at, upon request. Experience with hall-round wiring and safety system installations.

WORK EXPERIENCE

2017 - Now : **Electrician**

Spark XXX, *New York, NY*

Responsible for all the electricity works of course example line and more things I was responsible. I managed to achieve great results. Servicing most contract from all the staff in our company.

- Inspecting electrical component to ensure high quality.
- Electrical component inspection to ensure high service
- Ensuring high quality electrical inspection of electrical components
- High Quality control of components that are electrical and need inspection.
- Switched 250 light bulbs a day for a week when I was busted by my boss looking at naughty things during work.

2013 - 2017: **Assistant Electrician**

Electricians4U, *Tucson, AZ*

Responsible for all the electricity works example work and more examples was responsible. I managed to achieve great results. Servicing most contract from all the staff in our company.

- Inspecting electrical component to ensure high quality
- Electrical component inspection to ensure high service
- Switched 250 light bulbs a day for a week when I was busted by my boss looking at naughty things during work.
- High Quality control of components that are electrical and need inspection.

EDUCATION

- 2011- 2016: **Electrical Engineering**
University of Amsterdam
- 2008 – 2010 **Electrician Level 4**
MBO ‘The Screwdriver’
- 1990 – 1994 **High School, The Shooting White**
Graduated in 2005

ACTIVITIES

- 2018 – Now Volunteer – Fire Department Local County
- 2017 – Now National Guard Volunteer – Ministry of Defense
- 2010 – 2012 Treasurer of the local Tennis Club
- 2007 – 2008 Member of the Free Masons

COMPETENCIES

Computer skills:

Fully comprehensive with the following software:

- MS Office
- 3D Modeling and Infra Design XMD

Competencies:

Team player, accurate, motivated, reliable, fast and friendly

COURSES

- 2019 – 2019 First Aid Course – Advanced Certified in 2019.

HOBBIES AND PERSONAL INTERESTS

Interests: Electrical project around the house, Arduino Programming, Paragliding

REFERENCES
