

Financial Solutions Advisor Financial Solutions Advisor Financial Solutions Advisor - MERRILL East Greenwich, RI Work Experience Financial Solutions Advisor MERRILL - East Greenwich, RI July 2017 to Present Provides full service financial guidance to our affluent clients. Advises clients on financial and investment decisions including retirement planning, short-term and long-term asset goals, and portfolio management. Conducts reviews of investment portfolios and recommends solutions to help reach financial objectives. Effectively performs in a team oriented and highly collaborative environment. Provides mentorship and training to new hires. Creates and fosters a strong and effective sales team within the Financial Center. Collaborates with Consumer Banking Market Managers to motivate and improve under-performing branches. Licensed Investment Specialist Lincoln, RI August 2015 to July 2017 Built client relationships leading to over \$4mil in new assets. Gained extensive knowledge about FINRA and securities regulation. Effectively performed in a team oriented and highly collaborative environment. Developed policy and procedure guidelines for new hires. Assists supervisors and managers with administrative duties including sending team emails, coordinating events, updating team stats, and document shipping.

Client Systems Administrator Rhode Island Air National Guard - North Kingstown, RI September 2010 to September 2016 Enforced policy and procedures to new Airman. Created continuity guides for purposes of training new recruits. Coordinated and managed base wide projects and kept base commanders informed. Delegated tasks to team members and ensured all projects met deadlines. Manager Rhode Island Air National Guard - North Kingstown, RI February 2012 to December 2013 Administered the base Secret Internet Protocol Router Network (SIPRNET). Implements and manages the Air Force Electronic Key Management System (AFEKMS) program. Handled classified information and accounting. Reviewed Department of Defense's policy updates and implemented them base wide. Education Community College of the Air Force 2010 to 2015 Johnson & Wales University 2009 to 2010 Skills SERIES 7, SECURITY, OPERATIONS, OPERATIONS MANAGEMENT, WEALTH MANAGEMENT, MICROSOFT OFFICE Additional Information KEY SKILLS & CERTIFICATIONS United States Veteran Operations Management FINRA Series 7, 63, & 66 Certified CRPC (Chartered Retirement Planning Counselor) Wealth

Management DEVELOPMENT COURSES & AWARDS Airman Leadership Graduate Recipient
of National Microsoft Office Suite Top Secret Security Clearance Defense Medal John Hopkins
Leadership Award

Name: Travis Garcia

Email: walter92@example.org

Phone: 001-801-959-6491x6866