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| **RICHARD WILLIAMS** |
| **3665 Margaret Street, Houston, TX 47587 • RichardWilliams@gmail.com • (770) 625-9669** |
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| 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. |
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| **PROFESSIONAL EXPERIENCE** |
|  |
| Senior Financial Advisor  **WELLS FARGO ADVISORS, 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 |
|  |
| Financial Advisor  **SUNTRUST INVESTMENT SERVICES, INC., 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% |
|  |
| Financial Advisor  **MAVERICK CAPITAL MANAGEMENT, 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** |
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| **LOUISIANA STATE UNIVERSITY, Baton Rouge, LA**  *May 2014* |
| **Bachelor of Science in Business Administration** (concentration: finance), Honors: cum laude (GPA: 3.7/4.0) |
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| **ADDITIONAL SKILLS** |
|  |
| Proficient in MS Office (Word, Excel, PowerPoint) Outlook, Salesforce, TFS Project Management |

**Logo

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**Dear Job Seeker,**

The “Elegant” resume is one of our most popular templates because of its centered, expanded text within each header, white spacing, and overall soft aesthetic.

If you’re looking for a sophisticated and stylish resume, look no further. Any hiring manager will appreciate this template, but it’s especially noticeable if you’re applying for creative jobs like [graphic design](https://resumegenius.com/resume-samples/graphic-design-resume-example) or [photography](https://resumegenius.com/resume-samples/photographer-resume-example).

If you’re still struggling to write your resume, here are some free resources to help you put together a resume that shows employers you’re the right person for the job:

·     [Free Resume Builder](https://resumegenius.com/?utm_source=Word_Doc&utm_medium=Resume_Builder_Link&utm_campaign=RG_Downloads)

·     How to Write a Resume

·     [Resume Samples by Industry](https://resumegenius.com/resume-samples?utm_source=Word_Doc&utm_medium=Resume_Samples_Link&utm_campaign=RG_Downloads)

Once you have a great resume, pair it with a convincing cover letter using our matching [2021 cover letter template](https://resumegenius.com/cover-letter-templates/modern-templates#2021). Here are a few resources to help you write a cover letter that gives your application the boost it needs to land you an interview:

·     [Cover Letter Builder](https://resumegenius.com/cover-letter-builder?utm_source=Word_Doc&utm_medium=Cover_Letter_Builder_Link&utm_campaign=RG_Downloads)

·     [How to Write a Cover Letter](https://resumegenius.com/cover-letters-the-how-to-guide?utm_source=Word_Doc&utm_medium=Cover_Letter_Guide_Link&utm_campaign=RG_Downloads)

·     [Cover Letter Examples by Industry](https://resumegenius.com/cover-letter-examples?utm_source=Word_Doc&utm_medium=Cover_Letter_Examples_Link&utm_campaign=RG_Downloads)

Best regards,

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