**Jim Jones**

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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.

**Professional Experience**

Senior Financial Advisor

**Wells Fargo Advisors, Houston, TX**

*From August 2020 to 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**

*From July 2017 to 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%

**Education**

**Louisiana State University**

Baton Rouge, LA, United States

*2010 - 2014*

Bachelor’s of Science, Finance

**Additional Skills**

-Proficient in MS Office (Word, Excel, PowerPoint, Outlook)

-Salesforce

-TFS Project Management

-Fluent in English, Spanish, and French