**Suhaila (Sue) Amalanayagam**

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**Qualifications Profile**

Results-driven leader with transferrable expertise in finance and wealth management, including investment management, portfolio analysis, trend analysis, and risk management. Expertly analyze and synthesize data into actionable recommendations to improve financial performance. Adaptable, analytical, and focused on continuous improvement and growth.

**Areas of Expertise**

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| --- | --- | --- |
| * Portfolio & Financial Analysis | * Portfolio Management | * Risk Management & Reduction |
| * Investment Strategy | * Due Diligence & Quality Control | * Market Research & Analysis |
| * Wealth Management & Growth | * Process Improvement | * Regulatory Compliance |

**Experience Highlights**

**ELLEVEST– Private Wealth Management** New York, NY 2017 - Present

**Senior Manager, Client Services**

Lead client onboarding process consisting of capturing critical client information, and opening accounts at Schwab to anticipate personal and financial needs of clients. Liaise with financial advisors and internal teams such as investments, operations, compliance, and marketing; manage day-to-day operation of Private Wealth Management team and supervise client service managers to deliver exceptional service to clients. Provide feedback to key stakeholders on client needs and liaise with product development team to launch new products and implement changes in support of client requirements. Ensure new investment opportunities get communicated to clients through cohesive, consistent, and easy-to-understand messages and assist financial advisors in planning and executing strategies for getting clients invested.

***Key Accomplishments:***

* Collaborate with financial advisors and marketing department on events, content creation and advertising to monitor and assess growing trends to understand competitive environment and recommend changes to existing processes or additions to current service offerings.
* Coordinate with financial advisors to review marketing materials and incoming and outgoing correspondence to ensure quick and thorough answers to inquiries during prospecting process.
* Act as central point of contact between financial advisors, investments, operations, compliance and clients, anticipating client needs and cultivating existing relationships, resulting in repeat business.
* Increased client loyalty and retention through personalized touch point opportunities, such as email communications, holiday gifts, and comprehensive annual reviews for increased loyalty and retention.
* Guaranteed optimal performance by conducting periodic performance reviews of Client Services Team, identifying and addressing developmental needs.

**MERRILL LYNCH PRIVATE WEALTH MANAGEMENT** 2013 - 2017

***The Sharma Group, Boston, MA (2017-2019)*  | *Grunfeld- Vale & Associates, New York, NY (2013-2017)***

**Senior Registered Private Wealth Analyst**

Managed investment allocation processes, including data collection, analysis, and dissemination. Streamlined communications between clients and advisors regarding investment strategy, philosophy, and approach, delivering presentation materials and marketing for clients and prospects. Leveraged Portfolio Plus to coordinate account implementation and trading following review.

***Key Accomplishments:***

* Led portfolio model development while playing a key role in due diligence and performance analysis, measuring portfolio performance while recommending changes according to shifting risk exposure levels to achieve target asset allocations.
* Implemented exceptional client services to ~100 clients to generate growth and business referrals, generating $60M+ in external assets due to superior performance as a Client Representative and Financial Planner.
* Managed all client inquiries to ensure superior services while liaising between clients, financial advisors, and management regarding account openings, wires, maintenance, and regulatory compliance.
* Established custom reporting frameworks to improve client understanding of specific portfolio performance, standardizing the new reporting framework as a template spear sheet for use during client presentations.
* Implemented quality assurance controls to ensure filings and trading are compliant with SEC (Rule 144 and 10b5-1 plans).
* Assessed trend analysis and market research within domestic and global sectors during client conference calls, developing summarized meetings minutes to streamline information to senior leadership; interpret analytics and trends in client portfolios, developing reports for clients and internal leadership.
* Served as Forbes #1 advisor for several consecutive years along with Barron’s.

**Education & credentials**

**Bachelor of Arts, Managerial Economics** |Union College, Schenectady, NY | 2012

* Senior Thesis: *Conducted extensive research on Union Alumni to investigate gender disparities in investment decision-making and an examination of potential factors that increase investment portfolio risk in women.*
* Key Project(s): *Served as a Research Assistant to perform survey and interview research with high net worth Alumni to analyze behavioral patterns in comparison with those in Danko and Stanley’s “A Millionaire Next Door”.*

**Professional Development:** *NASD Series 7, 66 Licensure*

**Language Expertise:****Tamil***: Fluent*

**Technical Expertise:** *Bloomberg, Factset, Portoflio Plus, & Microsoft Office Suite*

**Honors & Awards**

**Forbes:** America’s Top Wealth Advisors (2016 – 2018) • Best-In-State Wealth Advisors (2018)

**Barron’s:** Top 100 Financial Advisors All-Star • America’s Top 100 Financial Advisors (2004 – 2018)

**Financial Times**: Top 400 Financial Advisors (2015 – 2018)