

Alexandre Eldredge
Charlotte, N.C.
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SKILLS Native French fluency, Excel, SQL, CRM, MS Office, Capital Markets
LICENSES FINRA Series 7, Series 63 (50 State Licensed), CFA Level 1 Candidate

WORK EXPERIENCE

VANGUARD

Charlotte, NC

Retirement Specialist

Aug 2019-Present

Internal promotion to assist clients with up to 10MM in assets under management with complex retirement needs.

- Leveraged subject matter expertise for client inquiries and actions revolving around IRA and small business accounts, to include conversion, recharacterization, and suitability.
- Partnered with internal consulting groups to grow enterprise lean maturity through implementations of standard processes to more consistently provide excellent service to clients.

VANGUARD

Charlotte, NC

Investment Professional

Sept 2018-Aug 2019

Registered Representatives work with prospective and current clients to provide exemplary service and set clients up for investment success.

- Used client relationship skills to uncover client intent and provide clients with the best Vanguard options to set them up for their financial goals.
- Managed complex client needs and situations with multiple stakeholders to mitigate and resolve not-in-good-order instructions.

LEADERSHIP EXPERIENCE

GAMECOCK BARBELL CLUB

President

The president handles all overarching aspects of club management to attain strategic goals, ensuring executive board members efficiently collaborate.

- Fostered relationships with alumni and local businesses to support the club through use of gym space and barbell athletics clinics.
- Established a full executive board for efficient delegation to achieve membership growth, club outreach, and fundraising.

CAMP SOAR: SPECIAL OLYMPICS ATHLETIC RETREAT

Group Leader

The group leader is responsible for a group of campers, and ensures safety and scheduling are maintained while promoting a fun and inclusive atmosphere for all.

- Worked with groups of 30-40 special needs campers and their volunteer buddies during week-long Special Olympics day camp sessions.
- Coordinated with volunteers, camp coordinators, and assistant leaders to run camp smoothly during day to day operations.

EDUCATION

University of South Carolina, *Bachelor of Science*

Awards: Robert W Baird Company Scholarship

Columbia, SC

Graduated May 2018