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| **Richard Williams** | | | |
| 3665 Margaret Street, Houston, TX 47587 • RichardWilliams@gmail.com • (770) 625-9669 | | | |
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| **Summary** | | | |
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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** | | | |
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| **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 | | | |
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| **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% | | | |
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| **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 | | | |
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| **Education** | | | |
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| **Bachelor of Science in Business Administration (concentration: finance),**  **Honors: cum laude (GPA: 3.7/4.0)**  LOUISIANA STATE UNIVERSITY, Baton Rouge, LA | | *May 2014* | |
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| **Additional Skills** | | | |
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| * Proficient in MS Office (Word, Excel, PowerPoint) Outlook, Salesforce, TFS Project Management * Fluent in English, Spanish, and French | | | |
| **Logo  Description automatically generated**  **Dear Job Seeker,**  Basic and professional, our “Easy” resume template makes [formatting your resume](https://resumegenius.com/blog/resume-help/resume-formatting) simple. Featuring everything you need to highlight your professional expertise and wrapped up in a classic format, this template is sure to please even the most critical hiring managers.  Because of its traditional design, the “Easy” resume template is perfect for candidates who need a highly formal resume. For example, if you’re a student applying for [law school](https://resumegenius.com/resume-samples/law-school-resume) or looking for work in [finance](https://resumegenius.com/resume-samples/finance-resume), this is the template for you.  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 [2022 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,  Shape  Description automatically generated with medium confidence  **IMPORTANT:** To delete the second page, right-click on the page and click “Delete Rows” | | |