Christian Dziedzic

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Summary of Qualifications:

- Passed CFA Level 1 Exam & FINRA Series 7 & 63 exams
- Experience balancing competing priorities by managing a high net worth book of business
- Aptitude for problem-solving and experience maintaining ownership of complex issues through resolution
- Excellent written and oral communication skills coupled with strong relationship management skills
- Experience working with mutual funds, equities, fixed income, ETFs
- Proven track record of process improvement
- Proficient in Microsoft Word, Excel, PowerPoint

Professional Experience

Self-employed — ***Informal Financial Coaching*** — **Feb 2018-Present**

- Provided point in time financial coaching to friends, family and individuals through word of mouth
- Assisted with topics such as financial goal setting, budgeting, debt reduction and saving strategies
- Answered questions on investments ranging from suitability to portfolio construction methodology
- Stayed up to date on current market news and trends

Vanguard, Flagship Services — ***Assigned Representative*** — **Jun 2016-Feb 2018**

- Assisted clients with portfolio management decisions such as asset allocation and tax efficiency
- Utilized Vanguard analytics tools to identify optimization opportunities in client portfolios
- Developed and managed relationships with book of business totaling $1 billion in assets
- Balanced proactive outreach with inbound contacts resulting in over 14 client interactions per day
- Identified client needs through consultative dialogue, generating above average sales leads
- Fielded complex client issues and assumed ownership of problem resolution
- Coordinated client interactions with business partners to ensure a seamless client experience

Vanguard, Flagship Services — ***Client Service Specialist*** — **Jun 2015-Jun 2016**

- Executed mutual fund and brokerage transactions with 100% accuracy
- Contributed to process improvement by submitting 10 suggestions to management, 3 were implemented
- Handled client issues in the first instance and coordinated with client's account managers
- Provided point-in-time investment guidance

Vanguard, Retail Services — ***Investment Professional*** — **Apr 2014-Jun 2015**

- Executed monetary and clerical transactions for client accounts with 100% accuracy
- Handled 50 phone calls per day on average, consistently among the most efficient reps
- Provided support to business partners in complex retirement topics and asset transfers
- Educated clients on basic investment principles and the Vanguard investing methodology

Education

West Chester University of Pennsylvania — **May 2013**

- B.S from the College of Business & Public Affairs
- Dual Major: Finance and Economics
- GPA: 3.4