Stephanie A. Kaminsky

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Goal-oriented, results driven financial professional with broad exposure and demonstrated capabilities in problem-solving resourcefulness and self-motivation. Comprehensive knowledge of financial products and selection process. Work experience with emphasis on relationship building developed strong interpersonal and communication skills, as well as time management and organizational skills. Can-Do Attitude looking for a position that will provide further professional growth.

License and Certifications

Series 6 ~ Series 7 ~ Series 66~ Health/Life/Long-Term Care Insurance

Core Competencies

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| --- | --- | --- |
| * Financial Planning Process * Industry Compliance * Prospecting/Lead Generation | * Client Service * Administrative Skills * Computer Proficient | * Continuing Education * Team Leadership * Relationship Develoment |

Professional Experience

**Ameriprise Financial** – Seattle, Washington Nov 2009–Present

**Paraplanner**

* Support five Financial Advisors through entire meeting process from preparation to implementation
* Prepare Portfolio Analysis for client meetings
* Produce and Complete all Paperwork for client transactions and compliance purposes
* Track Pending Business
* Conduct OTC trades
* Cultivate and Maintain on-going relationships and service options with clients
* Maintain Client Databases
* Develop and Implement administrative processes for increased accuracy and efficiency

**Wachovia** – Denver, Colorado July 2009–Nov 2009

**Teller**

* Conduct customer transactions
* Log and maintain financial records
* Identify and refer sales opportunities to Financial Advisors

**Trilogy Financial Services** – Denver, Colorado Jan 2009– July 2009

**Investment Executive**

* Conduct business development activities including networking and lead generation
* Interview clients in order to determine financial status and investment objectives
* Develop the financial plan and discuss recommendations with clients

Education

**Bachelor of Arts**

**Florida Atlantic University, Boca Raton, Florida**