ANDREA KLINE

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Detailed and dedicated personal financial advisor interested in helping clients achieve their financial goals. Specialized in traditional and Roth IRAs and emerging cryptocurrency markets. Proven ability to communicate complex financial concepts to clients and relate to their specific needs. Experienced conference speaker and financial workshop Leader.

PROFESSIONAL EXPERIENCE

SENIOR PERSONAL FINANCIAL ADVISOR Smith & Associates, New Orleans, LA I June 2015 - Present

- Assist in the creation of a cryptocurrency investment department to handle niche client needs and expand their portfolios
- Increase annual sales of insurance products by over 15%
- Work with clients to establish tax-advantaged retirement assets and closely monitor portfolio performance

PERSONAL FINANCIAL ADVISOR KPI Wealth Management, Portland, ME I June 2013 - May 2015

- Achieved investment returns for clients with a 6% increase over the industry average
- Wrote comprehensive and personalized financial plans for clients and consistently followed up on their progress
- Created a streamlined process for developing financial reports that resulted in a 10% annual cost-savings

EDUCATION

BACHELOR OF SCIENCE IN ACCOUNTING Columbia University, New York, NY | September 2009 - May 2013

KEY SKILLS

CERTIFICATIONS

- Technical skills: QuickBooks, Microsoft Office, MoneyLine • Series 7 license, FINRA, 2013
- Quantitative data analysis
- Debt management
- Communication