

ANTHONY ANDERSON

Personal financial advisor with a long track record of market-beating results. Adept at simultaneously managing the needs of dozens of clients with different financial situations. Clear communicator who explains the pros and cons of strategies in plain terms. Uses a client-focused approach that consistently generates good reviews.

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Tallahassee, FL, 22222
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PROFESSIONAL EXPERIENCE

SENIOR FINANCIAL ADVISOR

Bennington Associates,
Tallahassee, FL
December 2015 - Present

- Create and present financial models representing different investment strategies to c l i e n t s with net worths u p to \$5 m i l l i o n
- Manage relationships with 50+ clients total, holding a current 99% satisfaction rating and outperforming firm's average annual returns by 4%
- Identify optimal tax- and fee-reduction strategies
- Research and recommend investment opportunities in emerging markets and industries
- Conduct periodic reviews of portfolios and implement proper adjustments

FINANCIAL ADVISOR

Florida Financial Professionals, Inc.
Fort Myers, FL
July 2009 - November 2015

- ◆ Led adoption of MoneyGuidePro software, improving the efficiency of financial advisors by 8% across the company
- ◆ Canvassed for and contacted potential clients, then developed relationships with them, increasing the company's overall client base by 10%
- ◆ Advised clients regarding mutual funds, annuities, and other products
- ◆ Managed over \$200 million in total assets

EDUCATION

Bachelor of Science in Finance

Tallahassee School of Business,
Tallahassee, FL
September 2005 - June 2009

KEY SKILLS

- ◆ MoneyGuidePro, Quicken, and WealthTrace software
- ◆ Risk analysis
- ◆ Accounting and bookkeeping
- ◆ Tax planning

CERTIFICATIONS

- ◆ Certified Financial Advisor, Financial Professionals Association, 2019
- Series 6 and 7 licenses, Financial Industry Regulatory Authority, 2014