Monica Mantilla

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SUMMARY OF QUALIFICATIONS

- Strong relationship building skills with the ability to organically instill trust in others
- Highly self-motivated & results-oriented financial professional with a proven record of exceeding targeted goals
- Lead with integrity by maintaining the client's best interest at the forefront of every investment decision
- Ability to identify and execute on potential sales opportunities while providing world-class client service
- Excel within a collaborative environment and quickly adapt to unforeseen change

EDUCATION

University of Central Florida - Division of Continuing Education March 2019 - August 2019
Full Stack Web Development Bootcamp

University of Nebraska-Omaha August 2013 - May 2017
Bachelor of Science in Business Administration - Economics

WORK EXPERIENCE

Morgan Stanley, Wealth Advisor Associate August 2018 - Present

- Analyze Financial Advisors' books of business, develop strategies to increase revenue, and lead the execution
- Responsible for gathering financial data from clients, analyzing results, and presenting financial plans
- Drive digital email campaigns that resulted in over $8 million in net acquired assets
- Build relationships with FAs by setting weekly meetings where I educate them on ways to improve their practice

TD Ameritrade, Business Development Specialist June 2017- April 2018

- Successfully graduated from the Financial Consultant Development Academy
- Reengaged existing clients, assessed their needs and presented solutions best suited to their financial goals
- Developed a daily structure to exceed activity expectations and generate sales opportunities
- Demonstrated leadership by setting weekly goals, motivated team and updated Huddle Board
- Winner of team challenge by sending the most Branch Lead Referrals in a week

TD Ameritrade, Electronic Communication Group - Intern September 2016 – May 2017

- Resolved clients' questions and complaints by leveraging business partners and utilizing available resources

TD Ameritrade, Summer Internship June 2016 – August 2016

- Worked closely with a team to propose an innovative idea that was eventually implemented firm wide

COMMUNITY SERVICE AND RELEVANT EXPERIENCE

8 Cents in a Jar, Volunteer January 2019 - Present
Metro Credit Union, Teller October 2015 - May 2016
Collegiate Entrepreneurship Organization, Member August 2015 - May 2017
Event Ticket Sales LLC, Salesperson February 2015 – July 2015
Gallup Inc., Telephone Interviewer February 2014 - January 2015

CERTIFICATIONS AND ACCOMPLISHMENTS

- FINRA Licenses Series 7 & Series 66, Life, Health & Variable Annuities Insurance Licenses
- Financial Planning Specialist – Kaplan Professional Academy
- Trilingual: Spanish, English, French
- Certificate in Professional French B1 from CCI Chamber of Commerce – Besançon, France
- Alpha Xi Delta Sorority Alumna
- Awarded "Team Player" diploma, nominated for MVP, and consistently received positive peer/client feedback