

# Richard Williams

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(770) 625-9669  
RichardWilliams@gmail.com

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*Financial Advisor with 7+ years of experience delivering financial/investment advisory services to high value clients. Proven success in managing multi-million dollar portfolios, driving profitability, and increasing ROI through skillful strategic planning, consulting, and financial advisory services.*

## PROFESSIONAL EXPERIENCE

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### WELLS FARGO ADVISORS

*Senior Financial Advisor*

**Houston, TX**

*August 2020–Present*

- Deliver financial advice to clients, proposing strategies to achieve short- and long-term objectives for investments, insurance, business and estate planning with minimal risk
- Develop, review, and optimize investment portfolios for 300+ high value clients with over \$190M AUM (Assets Under Management)
- Ensure maximum client satisfaction by providing exceptional and personalized service, enhancing client satisfaction ratings from 88% to 99.9% in less than 6 months
- Work closely with specialists from multiple branches, managing investment portfolios for over 800 clients with over \$25M in assets under care

### SUNTRUST INVESTMENT SERVICES, INC.

*Financial Advisor*

**New Orleans, LA**

*July 2017–August 2020*

- Served as knowledgeable financial advisor to clients, managing an over \$20.75M investment portfolio of 90+ individual and corporate clients
- Devised and applied a new training and accountability program that increased productivity from #10 to #3 in the region in less than 2 year period
- Partnered with cross-functional teams in consulting with clients to provide asset management risk strategy and mitigation, which increased AUM by 50%

### MAVERICK CAPITAL MANAGEMENT

*Financial Advisor*

**New Orleans, LA**

*July 2014–August 2017*

- Served as the primary point of contact for over 15 clients
- Managed the portfolios of several major clients with over \$8.5M in total assets

## EDUCATION

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### LOUISIANA STATE UNIVERSITY

*Bachelor of Science in Business Administration*

**Baton Rouge, LA**

*May 2014*

## SKILLS

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- Proficient in MS Office (Word, Excel, PowerPoint)
- MS Project
- Salesforce
- TFS Project Management
- Fluent in English, Spanish, and French