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| Rami Shoula  Financial Advisor | |
| |  |  | | --- | --- | |  | Profile Experienced and driven Financial Advisor with over five years of experience providing clients with optimal assistance with retirement planning, estate planning, investment advice, tax strategies, and overall support managing their finances. Proven track record of competitive market share expansion and assisting corporations in reaching goals. Driven and detail-oriented with the ability to thrive in high pressure environments. Adept at developing key relationships and furthering business development. |  |  |  | | --- | --- | |  | Employment HistoryFinancial Advisor at Goldman Sachs, New York September 2013 — September 2019   * Developed and implemented new and improved financial policies based on extensive research findings. * Fostered successful relationships with 250+ clients, providing them with top of the line financial advisement. * Advised a total of $40 million in assets. * Mentored and trained new team members and worked collaboratively with existing members.  Financial Advisor at Bank of America, New York August 2008 — August 2013   * Increased client satisfaction rating by 8% in my first year. * Presented financial planning seminars to existing and prospective clients. * Discovered undervalued investments and identified long term sustainable growth. * Provided high quality investment guidance to clients based on their needs, goals, and lifestyle. * Contributed to a productive and happy work environment, dedicated to the satisfaction of the client. |  |  |  | | --- | --- | |  | ReferencesBrian Anderson from Bank of America [banderson@boa.com](mailto:banderson@boa.com) · 212-777-4372 Louise Nelsen from Goldman Sachs [lnelsen@goldmansachs.com](mailto:lnelsen@goldmansachs.com) · 212-552-2039 |  |  |  | | --- | --- | |  | EducationMaster of Finance, Columbia University, New York August 2008 — August 2010   * Graduated with High Honors.  Bachelor of Finance and Economics, Fordham University, New York August 2004 — May 2008   * Graduated *suma cum laude*. |  |  |  | | --- | --- | |  | InternshipsAccounting Intern at Bank of America, New York September 2007 — April 2008   * Assisted with financial reports and administrative tasks. | | DetailsSkills  |  |  | | --- | --- | | Market Growth & Expansion | | |  |  |  |  |  | | --- | --- | | Relationship Building | | |  |  |  |  |  | | --- | --- | | Market Analysis | | |  |  |  |  |  | | --- | --- | | Portfolio Management | | |  |  | |