1. Provided strategy advice to high net worth clients.
2. Researched fixed income alternatives to align with client asset allocation requirements.
3. Adjusted portfolio exposures to compensate for market conditions.
4. Communicated market developments, portfolio changes and annual performance information to clients.
5. Recommended investment strategies to meet client financial objectives.
6. Developed and presented proposals for new investments.
7. Assessed exposure, compared valuations and evaluated threats to strategies.
8. Developed rebalancing strategies to minimize risk exposures.
9. Achieved [Number]% or higher returns each year.
10. Facilitated portfolio performance review and implemented new strategies.
11. Highlighted values and educated clients on [Type], [Type] and [Type] financial products.
12. Prepared and hosted data room while coordinating legal and advisory teams and facilitating due diligence processes.
13. Boosted sales by [Number]% and exceeded sales target by employing consultative sales tactics and superior customer care.
14. Assisted clients in making beneficial and strategic decisions regarding investments, low-cash financing and sourcing overseas partners.
15. Researched [Type] rules and regulations, interviewed industry experts, constructed financial models, performed sensitivity analyses and compiled final reports to deliver top-notch service to customers.
16. Helped clients plan for and fund retirements using mutual funds and other options to manage, customize and diversify portfolio.
17. Partnered with local organizations to provide specialized financial planning support to diverse populations with unique needs.
18. Managed $[Number] in client investment portfolios by providing one-on-one service when meeting with clients to understand assets, expenses and long-term as well as short-term investment goals to devise personalized financial plan.
19. Cultivated and strengthened relationships with new clients and educated clients on account services and capabilities.
20. Educated clients on various financial matters and provided professional recommendations on investment opportunities, products and services based on each clients' individual needs.