1. Helped clients plan for and fund retirements using mutual funds and other options to manage, customize and diversify portfolio.
2. Prepared and hosted data room while coordinating legal and advisory teams and facilitating due diligence processes.
3. Assisted clients in making beneficial and strategic decisions regarding investments, low-cash financing and sourcing overseas partners.
4. Highlighted values and educated clients on [Type], [Type] and [Type] financial products.
5. 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.
6. Partnered with local organizations to provide specialized financial planning support to diverse populations with unique needs.
7. Educated clients on various financial matters and provided professional recommendations on investment opportunities, products and services based on each clients' individual needs.
8. 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.
9. Cultivated and strengthened relationships with new clients and educated clients on account services and capabilities.
10. Boosted sales by [Number]% and exceeded sales target by employing consultative sales tactics and superior customer care.
11. Performed due diligence and valuation processes.
12. Assisted brokers and advisors with servicing clients by preparing financial plans, conducting investment research and completing trades and transactions.
13. Capitalized on gaps in market and reached out personally to onboard new clients, process transfer paperwork and set up new accounts.
14. Assisted clients with preparing financial plans, conducting investment research and completing trades and transactions to assess and meet financial goals.
15. Recruited, trained and mentored junior financial and support staff to generate ideas, share knowledge and commit to building successful company.
16. Helped individuals and families build and execute wealth management strategies based on unique goals and objectives.
17. Worked with clients to support understanding of rationale and details of financial strategies.
18. Prepared for and coordinated marketing events, created marketing compliance documentation and managed event marketing reimbursement to increase customer base and grow revenue.
19. Delivered strategy advisement and corporate financing to clients.
20. Created business plan and identified target customers by interacting on phone and in person, handling basic inquiries and providing quotes.