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