1. Managed portfolio projects such as [Type] through [Action].
2. Managed and evaluated activities of [Number] outside investment advisors.
3. Mentored potential leadership candidates from pool of [Number] [Job title]s.
4. Assessed and reported on performance attribution on monthly and quarterly bases.
5. Set strategic framework for [Type] assets over annual investment period.
6. Developed various types of financial models to value debt and equity for mergers, acquisitions, and capital raising transactions.
7. Developed recommendations for product offerings, private equity transactions, mergers, and acquisitions and valuations.
8. Researched and shared recommendations on stock market trends and economic forecasts to support portfolio decisions.
9. Performed due diligence, research, analysis and documentation of transactions.
10. Issued debt and sold equity to raise capital.
11. Increased returns for clients by [Number]% over [Timeframe].
12. Handled financial transactions worth over $[Amount].
13. Assisted with corporate restructuring and facilitated mergers and acquisitions.
14. Maximized returns from [Type] investments by [Action].
15. Developed and presented detailed analysis of investment performance, portfolio attributes and benchmark composition to evaluate investment strategies.
16. 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.
17. Cultivated client relationships through high levels of direct communication to maintain customer loyalty.
18. Monitored, managed and developed investments such as [Type] to achieve [Result].
19. Highlighted values and educated clients on [Type], [Type] and [Type] financial products.
20. Created and executed aggressive investment strategies to increase returns for clients.