1. Used [Software] and [Software] to calculate client assets, liabilities, insurance coverage and cash flow to create investment strategies.
2. Created debt management plans, spending plans and budgets to assist clients in meeting financial goals.
3. Monitored clients' accounts to determine needed changes to improve performance or accommodate life changes such as getting married or having children.
4. Advised clients on portfolio allocation and various investment types, including equities, fixed income, mutual funds, managed accounts and SMAs.
5. Initiated customer relationships through prospecting, lead utilization, local market and community involvement, acquiring [Number] new clients per [Timeframe].
6. Sold $[Amount] in financial products, including life insurance, retirement instruments and investments.
7. Evaluated financial reporting systems, accounting and collection procedures and investment activities to make recommendations for changes to procedures, operating systems, budgets and other financial control functions.
8. Examined clients' overall financial situation by reviewing income, assets, debts, expenses and credit reports.
9. Promoted [Company] products and services by conducting educational seminars to clients and prospects in [Location].
10. Analyzed clients' financial situations to offer products to improve standard of living.
11. Prepared and hosted data room while coordinating legal and advisory teams and facilitating due diligence processes.
12. Educated clients on various financial matters and provided professional recommendations on investment opportunities, products and services based on each clients' individual needs.
13. Generated financial analysis reports and financial management proposals using [Software] and [Software].
14. Cultivated and strengthened relationships with new clients and educated clients on account services and capabilities.
15. Performed quantitative analysis of financial investments to minimize risks.
16. Highlighted values and educated clients on [Type], [Type] and [Type] financial products.
17. Boosted sales by [Number]% and exceeded sales target by employing consultative sales tactics and superior customer care.
18. Partnered with local organizations to provide specialized financial planning support to diverse populations with unique needs.
19. Assisted clients in making beneficial and strategic decisions regarding investments, low-cash financing and sourcing overseas partners.
20. 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.