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