

INVESTMENT ADVISOR*Portfolio Management, Client Services, Financial Planning*

Highly accomplished and results-driven Finance Executive with over 20 years of successful new business development, competitive market share expansion, and business leadership experience. Leverages finely-honed interpersonal and time management skills to successfully manage an account and increase market value achieving corporate goals and objectives. Energetic and goal-oriented with a genuine passion for investment strategy and a well-rounded background in supporting a progressive organization in optimizing performance and growth. Astute communicator and presenter adept at establishing rewarding relationships to benefit business development.

AREAS OF EXPERTISE

- | | |
|---------------------------------|-------------------------------|
| ◆ Investment Strategies | ◆ Client/Investor Relations |
| ◆ Market Growth & Expansion | ◆ Portfolio Management |
| ◆ Relationship Building | ◆ Strategic Business Planning |
| ◆ Asset Management | ◆ Cross-selling |
| ◆ Market Analysis & Penetration | ◆ New Business Development |

CORE COMPETENCIES

- ✓ Highly skilled in creating sound investment solutions, developing high-levels of market growth, and facilitating effective financial management strategies to increase portfolio value.
- ✓ Proven ability to effectively handle multi-task levels of management responsibility with minimal direction from superiors while supervising personnel, providing team leadership, motivation, and development.
- ✓ Solid communication, interpersonal, time management, analytical, organizational, and leadership skills.
- ✓ Go-getter attitude with an ability to easily grasp new ideas, concepts, methods and investment techniques.
- ✓ Experienced in forecasting, account performance analysis, investor relations, market research, financial planning, and networking.

PROFESSIONAL PROFILE

JP MORGAN BANK · New York, NY**1990 – Present*****Vice President***

Assumes full responsibility for overseeing trust and investment management accounts valued at over \$360M in market value while continuously identifying, specifying, and reconfirming investor objectives.

Key Accomplishments

- ⇒ Received Service Star Award in Q1 of 2003 and Outstanding Performance Valuation throughout tenure
- ⇒ Secured \$60M in business relationships with focus on performance and customer service

EDUCATION AND TRAINING

FORDHAM UNIVERSITY

MBA IN FINANCE (2001)

ST. FRANCIS COLLEGE

B.S. IN BUSINESS MANAGEMENT

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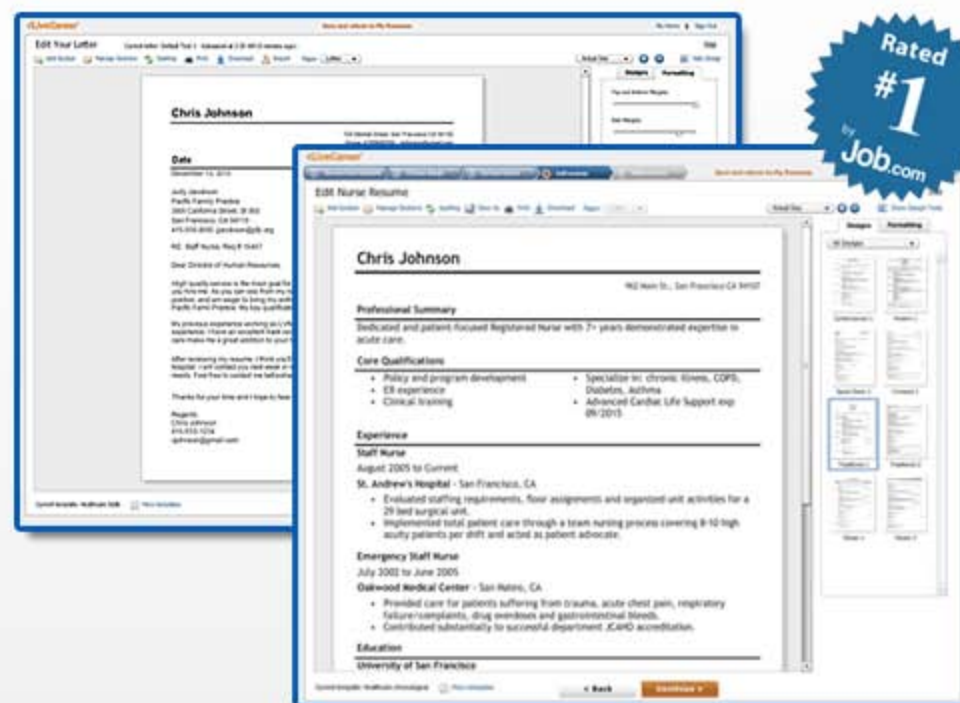
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Customer Reviews

"I was completely unaware of what companies are looking for in a resume. This product helped me word and format my professional resume and the examples were extremely useful. Overall, this is a great product. I would highly recommend these services." - A. Danihels

"This resume tool is so much better than templates - just upload or enter your resume content and you get your choice of designs. It's magical! Anyone can benefit from this tool: from students to executives!" - Belinda Yanda

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