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### Professional Summary

Certified Financial Planner with over 10 years of experience advising clients on investment strategies, tax planning, and retirement solutions across diverse sectors. Skilled in portfolio management, risk assessment, and financial forecasting. Exceptional communicator with a strong commitment to client-centered solutions and ethical financial practices.

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### Work Experience

- Financial Planner  
WealthFront Advisors, Nairobi, Kenya  
March 2016 – Present
    - Manage personal and corporate client portfolios, focusing on asset allocation, tax optimization, and retirement planning.
    - Developed customized financial plans that improved client wealth growth by an average of 12% annually.
    - Educate clients on investment options, market trends, and risk mitigation strategies.
    - Coordinate with tax advisors and legal professionals to ensure compliance with regulatory requirements.
  - Junior Financial Analyst  
Capital Growth Partners, Nairobi, Kenya  
July 2011 – February 2016
    - Conducted extensive market research and investment risk analysis for equity and fixed income portfolios.
    - Assisted senior analysts in preparing detailed financial reports and presentations for key stakeholders.
    - Improved data collection processes, leading to a 20% increase in reporting accuracy.
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Education  
Bachelor of Commerce in Finance  
University of Nairobi, Kenya — Graduated 2011

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## Certifications

Certified Financial Planner (CFP) – Financial Planning Standards Board, 2015

Chartered Financial Analyst (CFA) Level I Candidate – CFA Institute, 2024

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## Skills

- Financial Planning and Advisory
- Investment Portfolio Management
- Tax Planning and Compliance
- Risk Assessment and Forecasting
- Client Relationship Management
- Financial Reporting and Analysis