

David Kimani
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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.

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

Certifications

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

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

Skills

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