SIMPLE GOOGLE DOCS TEMPLATE

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Financial Advisor with 7+ years of experience delivering financial/investment advisory services to high value clients. Proven success in managing multi-million dollar portfolios, driving profitability, and increasing ROI through skilful strategic planning, consulting, and financial advisory services.

Professional Experience

Senior Financial Advisor
WELLS FARGO ADVISORS, Houston, TX
August 20XX–Present

- Deliver financial advice to clients, proposing strategies to achieve short- and long-term objectives for investments, insurance, business and estate planning with minimal risk
- Develop, review, and optimize investment portfolios for 300+ high value clients with over $190M AUM (Assets Under Management)
- Ensure maximum client satisfaction by providing exceptional and personalized service, enhancing client satisfaction ratings from 88% to 99.9% in less than 6 months
- Work closely with specialists from multiple branches, managing investment portfolios for over 800 clients with over $25M in assets under care

Financial Advisor
SUNTRUST INVESTMENT SERVICES, INC., New Orleans, LA
July 20XX–August 20XX

- Served as knowledgeable financial advisor to clients, managing an over $20.75M investment portfolio of 90+ individual and corporate clients
- Devised and applied a new training and accountability program that increased productivity from #10 to #3 in the region in less than 2 year period
- Partnered with cross-functional teams in consulting with clients to provide asset management risk strategy and mitigation, which increased AUM by 50%

Financial Advisor
MAVERICK CAPITAL MANAGEMENT, New Orleans, LA
July 20XX–August 20XX

- Served as the primary point of contact for over 15 clients
- Managed the portfolios of several major clients with over $8.5M in total assets

Education

LOUISIANA STATE UNIVERSITY, Baton Rouge, LA
May 20XX

Bachelor of Science in Business Administration (concentration: finance), Honors: cum laude (GPA: 3.7/4.0)

Additional Skills

- Proficient in MS Office (Word, Excel, PowerPoint) Outlook, Salesforce, TFS Project Management
- Fluent in English, Spanish, and French