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| **[First Name]**  Financial Advisor Resume  Dundee, United Kingdom  +44 1234567890  first.last@gmail.com |  | **EXPERIENCE**  **Financial Advisor**  Resume Worded, London, United Kingdom  Education technology startup with 50+ employees and $100m+ annual revenue  08/2021 – Present   * Provided information on risk-tolerance assessment to 30+ key clients regarding investment strategies. * Analyzed monthly market sector reports of recent news, equity choices, and a 52-week financial outlook. * Developed a financial plan for 410+ customers based on them socio-economic status and objectives. * Conducted thorough analysis of financial statements to detect discrepancies; identified 20+ areas for improvement.   **Private Equity Analyst**  Polyhire, London, United Kingdom  NYSE-listed recruitment and employer branding company  10/2019 – 07/2021   * Expanded investments into sectors across international markets, maintaining high performance in 10+ portfolios with low-risk exposure. * Combined financing strategies for the investments of 240+ clients, generating 56% returns and maintaining positive cash flow. * Executed short sale transactions using analytical tools to identify when to exit 30+ risky investments.   **Financial Specialist**  Growthsi, London, United Kingdom & Barcelona, Spain  Career training and membership SaaS with 150,000 users  11/2018 – 09/2019   * Identified and resolved problems affecting cash flow in the company, improving operating efficiencies by 70% YoY. * Examined the accounting systems at Growthsi to determine acquisition benefits while increasing efficiencies across 10+ departments. * Analyzed monthly portfolio performance while monitoring customer trading activity via 120+ phone calls and 700+ e-mail correspondence. * Provided expert advice about business development opportunities, leading to contracts worth $150K. |
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| **EDUCATION**  **University of New York**  **Bachelor of Science**  Business Administration  New York City, New York  10/2011 - 06/2014  **SKILLS**  **Hard Skills:**   * Financial Planning * Retirement Planning * Strategic Planning * Research * Risk Assessment * Equity Analysis   **Techniques:**   * Client Management * Needs Analysis * Wealth Management   **Tools and Software:**   * Fugent * Precise FP * Paladin * Monte Carlo Simulation |  |
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