|  |  |  |
| --- | --- | --- |
| **EDUCATION**  |  | **EXPERIENCE** **Financial Advisor,** Wells Fargo Advisors, Richmond, VA August 2016–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 by serving 300+ high value clients and over $190M AUM (Assets Under Management)
* Ensure maximum client satisfaction by providing exceptional and personalized service to each client, enhancing client satisfaction ratings from 88% to 99.9%
* Work closely with specialists in multiple branches, managing investment portfolios for over 800 clients with over $25M in assets under care
* Design and implement templates of internal financial reports and dashboards for operational departments which increased profits by 40%

**Financial Advisor,**SunTrust Investment Services, Inc., Charlottesville, VAJuly 2013–August 2016* Served as knowledgeable financial advisor to clients, managing over $20.75M investment portfolio of 90+ individual and corporate clients
* Created investment/asset allocation models and proposed strategies to capitalize on market, risk, and insurance opportunities.
* Devised and applied a new training and accountability program that increased productivity from #10 to #3 in the region within 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%
* Developed new Business by cultivating solid relationships with clients, increasing the number of high-worth clients by 30%
 |
| **Bachelor of Science in Business Administration** (concentration: finance), River Brook University, Chicago, ILJuly 2013Honors: cum laude (GPA: 3.6/4.0) |  |
|  |
| **RESUME SUMMARY**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 skillful strategic planning, fine-tuned consulting, and financial advisory service**KEY SKILLS** * Proficient in MS Office (Word, Excel, PowerPoint) Outlook, MS Project, Salesforce, TFS Project Management, Webex, and GoTo Meeting
* Bilingual in Spanish and English
 |  |
|  |
|  |  |