**FINANCE COVER LETTER**

Jan 25, 20XX

Sean Employer

Head of Wealth Management

Bluestone Private Banking

1 Main Avenue

Houston, TX 77002

Dear Sean,

I am more than pleased to submit my application for the position of Senior Wealth Manager at Bluestone. With 5+ years of experience at Whiterock under my belt and experience in managing a portfolio of 100+ clients, $230m invested, I believe I am ready for new challenges such as helping Bluestone to expand to the Latin America markets both in terms of investment, and investors—my native Spanish and fully fluent Portuguese coming invaluable.

I understand a large part of the scope of responsibilities will be devoted to expanding to Latin America. I have experience in meticulously scouring for, and successfully approaching clients, often finding investment opportunities along the way. In 20XX and 20XX, I have taken the company prize for most new investment secured ($24m, and $29m respectively).

In 20XX, I was not eligible, as I have been promoted and given responsibility of managing a portion of our existing portfolio, with the targets of 1% ROA and 5% ROE. We closed the year with a 1.19% ROA, and a 9.2% ROE. As a result of these results, new business flooded in, and we started 20XX by signing 12 new clients and adding their combined $44m into the portfolio. Since 20XX, I have also trained and mentored 4 new financial advisors for my team (to make 11 people total), instituting a clear competition to stimulate new investment. Together, these four have secured $8m of new investment in 20XX.

By taking over the post of Senior Wealth Manager at Whiterock, I would finally be able to put my Spanish-Portuguese multilingualism to work, an opportunity that I do not have in my current position. I also believe I have the proven track record to be entrusted with a larger portfolio and team than the one I currently manage.

When could we meet to discuss where and how we should start our Latin America operations?

Best Regards,

Maria S. Hernandez