**Zara Williams**

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(770) 625-9669

**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, consulting, and financial advisory services.

**Professional Experience**

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

* 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

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

* 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%

**Education**

May 20XX

LOUISIANA STATE UNIVERSITY, Baton Rouge, LA

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, MS Project, Salesforce, TFS Project Management, Webex
* Fluent in English, Spanish, and French