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| **ADAM GREENE**  Financial Advisor Resume | | |
| **CONTACT INFORMATION**  Minneapolis, MN  (640) 555-9616  agreene@example.com |  | **EMPLOYMENT HISTORY**  **EMPLOYMENT HISTORY**  **Finance Advisor** 2020 - Present  NORTHWESTERN LIFE INSURANCE Minneapolis, MN   * Worked in the field to ask clients and prospects lots of questions to understand their financial goals. * Analyzed client financial situations and created personal plans with the best solutions for future financial planning and goals. * Work closely with clients to develop customized solutions that meet long-term financial goals and objectives.   **Finance Advisor** 2019 - 2020  Northwestern Mutual Franklin, WI   * Meet with clients to discuss their financial situation Worked with new clients through referrals and networking Helped clients create financial security * Coordinated meetings for the Financial Advisor Organized client files to assure accessibility Maintained and updated Excel spreadsheet * Researched, analyzed and resolved customer service issues and oversaw underwriting requirements. * Construct high dividend portfolio and structured investment with more than 20% yield.   **Equity Trader** 2014 - 2019  Breakwaters Chicago, IL   * Devised strategies in fixed income trades based on interpretation of economic data. * Traded and analyzed U.S. Treasuries Fixed Income Securities. * Maintained and updated MCM portfolio during European session. |
| **EDUCATION**  **Bachelor's Degree Finance**  2011 - 2014  DePaul University  Chicago, IL |  |
| **SKILLS**   * Logistics * Foreign Currency * US Equities * Fundamental Analysis * Stock Market * Sell Side * Financial Needs * Wealth Management * Futures Markets * Financial Markets |  |