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| **[First Name]** Financial Advisor ResumeDundee, United Kingdom+44 1234567890first.last@gmail.com |  | **EXPERIENCE****Financial Advisor** Resume Worded, London, United KingdomEducation technology startup with 50+ employees and $100m+ annual revenue08/2021 – 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 KingdomNYSE-listed recruitment and employer branding company10/2019 – 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, SpainCareer training and membership SaaS with 150,000 users11/2018 – 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 AdministrationNew York City, New York10/2011 - 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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