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| **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, VA  July 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, IL  July 2013  Honors: cum laude (GPA: 3.6/4.0) |  |
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| **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 |  |
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