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| **CHELSEA CRIST**  Financial Advisor Resume  **SUMMARY**  Client-focused financial advisor with 5+ years of experience growing wealth for clients. Seeking to provide expert guidance at Day & Astoria. Raised performance of individual client accounts by 30% at Lovitz Abernathy through UAFRS accounting analysis. |

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| **EDUCATION**  **University of Kansas**  2010–2014  Excelled in financial planning classes.  Vice President, Student Valuation Club. Grew membership 70%.  **ADDITIONAL ACTIVITIES**  **Conferences**  FinCon 2019 — Spoke on panel about investing  Morningstar Investment Conference 2017  **Speaking Engagements**   * Webinar — When will the next crash come? * Talk — Beating the market with UAFRS — FinCon   **Classes Taught**   * Investing 101 — Online and at University of Kansas * Advanced Retirement Investing — Online   **CERTIFICATION:**  **Certified Financial Planner** 2019 |  | **PROFESSIONAL EXPERIENCE**  **Financial Advisor**  Lovitz Abernathy May 2015 - Jan 2020   * Served as financial advisor in high-end investment firm. Managed internal systems and client accounts and executed trades. * Managed 120+ client accounts with $180M under management. * Increased assets under management by $20M in 15 months. * Wrote 110+ successful financial plans. * Achieved client returns 10% higher than firm average. * Raised client satisfaction by 33% in 10 months through increased one-on-one time and increased client returns.   **Key Achievement:**  Raised account performance for individual investors by 30% through using UAFRS data to augment as-reported GAAP data.  **Accountant**  Klum Feld Outdoors May 2014 - Sept 2015   * Provided recommendations that grew investment ROI 25%. * Developed standardized reports that allowed 20% time savings.   **SKILL**  **Hard Skills:** financial research, client education, financial assessment, financial planning, sales  **Soft Skills:** interpersonal skills, active listening, time management, communication |