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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**2010–2014Excelled in financial planning classes.Vice President, Student Valuation Club. Grew membership 70%.**ADDITIONAL ACTIVITIES****Conferences**FinCon 2019 — Spoke on panel about investingMorningstar 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 |