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| **SUMMARY**  High-performing financial advisor with 6+ years of experience. Highly skilled in client education, financial planning, and analysis. Seeking position at Resnick & Sheckley Financial Services. At Fairchild Livingston, raised client satisfaction score from 85% to 99% through using automation to free up more time to spend with clients. Maintained client returns 4% higher than team average. | | |
| **Jack Beal**  Financial Advisor Resume | | |
| **CONTACT INFORMATION**  jack.q.beal@gmail.com  708-408-7131  LinkedIn.com/in/jack-q-beal  Twitter.com/jackqbeal |  | **EMPLOYMENT HISTORY**  **Financial Advisor**  Fairchild Livingston Nov 2014–March 2019   * Executed trades, managed internal systems, and wrote financial plans for 150+ clients with over $200M under management. * Maintained client returns 4% higher than team average. * Increased client satisfaction scores from 85% to 99% through using time-saving automation tools to spend 8 hours more per week with clients. * Increased AUM by 25% in 18 months. * Used UAFRS data from Valens Research to identify undervalued investments. Raised individual investor client performance by 35%.   **Financial Advisor**  Melcher Advisors Nov 2013–Nov 2014   * Developed and presented financial planning and investment seminars for clients and prospects. Increased client satisfaction 50% and grew client base 28%. * Created standardized reports that resulted in a better understanding of real-time performance. This allowed the firm to raise client returns 15%. * Mentored 3 financial advisors who had been marked for termination. They became 3 of the firm’s top 5 performers.   **ACTIVITIES**   * Volunteer financial planner for Arthur Zissner Charitable Trust, $3.5M AUM. * Row in a competitive rowing shell 3x per week for fitness and self-care. |
| **EDUCATION**  **Bachelor of Science in Business**  2009–2013 Northwestern University   * President, MarketWatch student organization. Grew membership by 200%. * Conducted senior project to build imaginary hedge fund. Based on stock picking, would have grown $50,000 into $100,000 in one year.   **SKILLS**  **Hard skills:**  Client education, generating reports, equity analysis, sales  **Soft skills:**  Interpersonal skills, communication, collaboration, analytical skills |  |