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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.com708-408-7131LinkedIn.com/in/jack-q-bealTwitter.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.
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| **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 |  |