

# Your Name

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## PROFESSIONAL SUMMARY

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Results-driven Financial Advisor with 7+ years of progressive experience managing high-net-worth client portfolios totaling \$190M+ AUM. Demonstrated expertise in wealth management, investment strategy, and portfolio optimization. Proven track record of enhancing client satisfaction to 99.9% and driving 50% AUM growth through strategic planning and exceptional client service. MBA candidate seeking to leverage analytical skills and financial acumen in a senior advisory role.

## PROFESSIONAL EXPERIENCE

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### Senior Financial Advisor

*Wells Fargo Advisors*

*August 2020–Present*

*Houston, TX*

- Manage comprehensive financial planning for 350+ high-net-worth clients with over \$190M in assets under management, delivering customized investment strategies aligned with client objectives
- Develop and optimize diversified investment portfolios across equities, fixed income, and alternative investments, achieving risk-adjusted returns 15% above benchmark indices
- Elevated client satisfaction ratings from 88% to 99.9% within 6 months through implementation of personalized service model and proactive communication framework
- Provide strategic advisory services on estate planning, tax optimization, and risk management, resulting in average 22% improvement in after-tax returns for clients

### Financial Advisor

*SunTrust Investment Services, Inc.*

*July 2017–August 2020*

*New Orleans, LA*

- Directed investment strategy for 90+ individual and corporate clients with combined portfolio value exceeding \$20.75M, maintaining 95% client retention rate
- Designed and implemented innovative training and accountability program that improved regional productivity ranking from #10 to #5 within 18 months
- Collaborated with cross-functional teams to deliver comprehensive asset management and risk mitigation solutions, driving 50% increase in AUM through client referrals and new business development
- Conducted in-depth financial analyses and market research to identify investment opportunities, resulting in average annual returns of 12% across managed portfolios

### Financial Advisor

*Maverick Capital Management*

*July 2014–August 2017*

*New Orleans, LA*

- Served as primary relationship manager for 15+ high-value clients, providing personalized financial planning and investment advisory services
- Managed diversified portfolios totaling \$8.5M in assets, executing tactical asset allocation strategies to optimize risk-return profiles
- Built strong client relationships through consistent communication and tailored financial solutions, achieving 100% client retention

## EDUCATION

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### **Master of Business Administration (MBA) – In Progress**

*Rice University, Jones Graduate School of Business*

*Expected May 2027*

*Houston, TX*

- Concentration: Finance and Strategic Management
- Relevant Coursework: Corporate Finance, Investment Analysis, Financial Modeling, Strategic Management

### **Bachelor of Science in Business Administration**

*Louisiana State University*

*May 2014*

*Baton Rouge, LA*

- Honors: Cum Laude
- GPA: 3.7/4.0
- Major: Finance
- Achievements: Dean's List (6 semesters) | Finance Student Association, Vice President

## CERTIFICATIONS & SKILLS

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**Certifications:** Series 7 Series 66 CFP® (in progress)

**Technical Skills:** Bloomberg Terminal, FactSet, Morningstar Direct, Salesforce CRM, Microsoft Office Suite (Advanced Excel, PowerPoint), Financial Modeling, Portfolio Analysis **Languages:** English (Native), Spanish (Fluent), French (Conversational)