

# **LIAM ANDERSON**

Senior Financial Services Consultant

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- Los Angeles
- www.qwikresume.com



Wealth Management

**Budgeting Skills** 

Tax Planning

Regulatory Compliance

Client Relationship Management



**DIY Projects** 

Crafting

Meditation

Mistory



Humility

Innovation

Insightfulness

✓ Integrity









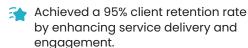
English

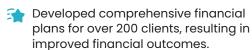
Spanish

French

## ACHIEVEMENTS







# 🔼 PROFESSIONAL SUMMARY

Accomplished Senior Financial Services Consultant with a decade of experience in delivering innovative financial solutions and strategic planning. Proven track record in enhancing client satisfaction through tailored investment strategies and comprehensive financial advice. Committed to driving organizational success by leveraging analytical expertise and building lasting client relationships.

## WORK EXPERIENCE

#### Senior Financial Services Consultant

## Feb / 2018-Ongoing

Toronto, ON

#### Maple Leaf Consulting

- 1. Designed and executed customized financial, retirement, and insurance plans for diverse clients and small businesses.
- 2. Managed client investment portfolios, ensuring alignment with their financial goals and risk tolerance.
- 3. Developed and led training initiatives for new employees on financial products and client management.
- 4. Oversaw the sales process for retirement and health insurance plans for new employees, enhancing service quality.
- 5. Conducted training sessions on investment and insurance software for new staff, improving operational efficiency.
- 6. Maintained compliance with industry regulations through diligent recordkeeping and reporting.
- 7. Executed reconciliation of financial statements and management accounts for local and international clients.

#### **Financial Services Professional**

m Feb / 2015-Feb / 2018

### Lakeside Apparel Co

♣ Chicago, IL

- 1. Built and nurtured strong working relationships with clients, ensuring high levels of satisfaction.
- 2. Delivered exceptional customer service, resolving client inquiries and concerns promptly.
- 3. Collaborated with hiring managers to streamline recruitment processes and improve candidate selection.
- 4. Prepared candidates for interviews, enhancing their readiness and confidence.
- 5. Implemented effective problem-solving strategies to address operational challenges.
- 6. Developed targeted action plans for timely fulfillment of open positions.



## EDUCATION

#### Bachelor of Science in Finance

## Feb / 2012-Feb / 2015

University of Texas

耳 Santa Monica, CA

Focused on investment analysis, financial modeling, and risk management.

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