



# LIAM ANDERSON

Senior Financial Services Consultant

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## SKILLS

Wealth Management



Budgeting Skills



Tax Planning



Regulatory Compliance



Client Relationship Management



## INTERESTS

DIY Projects     Crafting

Meditation     History

## STRENGTHS

Humility     Innovation

Insightfulness     Integrity

## LANGUAGES



English



Spanish



French

## ACHIEVEMENTS

Increased client portfolio value by 30% through targeted investment strategies.

Achieved a 95% client retention rate by enhancing service delivery and engagement.

Developed comprehensive financial plans for over 200 clients, resulting in improved financial outcomes.

## 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

Maple Leaf Consulting

Toronto, ON

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 record-keeping and reporting.
7. Executed reconciliation of financial statements and management accounts for local and international clients.

### Financial Services Professional

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

Santa Monica, CA

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