



MASON WILSON

Financial Services Professional

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PROFESSIONAL SUMMARY

Dedicated financial services professional with 5 years of experience in client relationship management and strategic financial planning. Skilled in developing tailored financial strategies to meet diverse client needs and enhance satisfaction. Eager to leverage analytical expertise to drive business growth and foster long-term client relationships.

WORK EXPERIENCE

Financial Services Professional
WidgetWorks Inc. Feb / 2021-Ongoing
Denver, CO

- 1. Integrated essential financial principles with investment and insurance products, crafting comprehensive strategies for individuals and families.
- 2. Developed plans emphasizing cash flow management, debt reduction, and insurance protection.
- 3. Promoted a diverse range of financial products, including mutual funds and education savings plans.
- 4. Conducted thorough evaluations and approvals of securities business.
- 5. Analyzed securities from multiple providers to ensure optimal client outcomes.
- 6. Maintained organized branch office documentation and literature.
- 7. Assisted numerous clients in enrolling in ACA-compliant health plans.

Financial Services Professional
Cactus Creek Solutions Feb / 2020-Feb / 2021
Phoenix, AZ

- 1. Built and maintained long-term relationships with clients, establishing trust and loyalty.
- 2. Conducted comprehensive analyses of client needs to present tailored solutions.
- 3. Specialized in family protection and future college funding strategies.
- 4. Collaborated with business owners to devise tax-saving action plans.
- 5. Leveraged a strong network to provide additional services beyond licensing capabilities.
- 6. Generated leads through consistent outreach, averaging 60 cold calls daily.

EDUCATION

Bachelor of Science in Finance
State University Feb / 2019-Feb / 2020
Portland, OR

Studied financial analysis, investment strategies, and risk management.

SKILLS



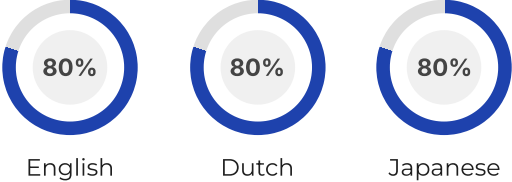
INTERESTS

- Podcasts
- Language Learning
- Dancing
- Cycling

STRENGTHS

- Intuition
- Leadership
- Listening
- Mentorship

LANGUAGES



ACHIEVEMENTS

- Increased client retention by 30% through personalized financial strategies.
- Successfully enrolled over 100 clients in comprehensive financial plans.