Robert Smith

Financial Solutions Advisor

CONTACT DETAILS

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PERSONAL STATEMENT

Seeking a Financial Solutions Advisor profession with an outstanding career opportunity that will offer a rewarding work environment along with a winning team that will fully utilize management skills.

WORK EXPERIENCE

Financial Solutions Advisor

ABC Corporation - June 2014 – September 2016

Responsibilities:

- Worked with preferred clients to help them implement solutions to meet their long term banking and investment goals.
- Engaged in deep life priorities conversations to gain a comprehensive picture of their financial situation and priorities.
- Recommended and implemented solutions for them as well as provide ongoing advice to maintain and expand the relationship.
- Self- directed accounts enabling clients to engage in their own investment trading.
- Managed fee based accounts when I act in a fiduciary capacity for the clients.
- Commonly worked with many mutual fund families, individual stocks, exchange traded funds, bonds, and unit investment trusts.
- Built strategic partnership with Financial Center as a valued team member.

Financial Solutions Advisor

Delta Corporation - 2013 – 2014

Responsibilities:

- Sell services or equipment, such as trusts, investments, or check processing services.
- Develop prospects from current commercial customers, referral leads, or sales or trade meetings.
- Determine customers financial services needs and prepare proposals to sell services that address these needs.
- Contact prospective customers to present information and explain available services.
- Maintained top 20% performance while in role Perform relationship reviews with top customers Drive sales strategy in financial center.
- Transition service calls to sales Build relationships with clients to establish trust in recommendations Assist colleagues with questions Meet .
- Provide day-to-day telephone support and financial solutions for upwards of 200+ customers daily.

SKILLS

Ms. Word, Planning Skills.

LANGUAGES

English (Native)
French (Professional)
Spanish (Professional)

INTERESTS

Climbing
Snowboarding
Cooking
Reading

REFERENCES

Reference – 1 (Company Name)
Reference – 2 (Company Name)

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Education

Bachelor Of Science

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