ROBERT SMITH

Independent Financial Consultant

E-mail: info@qwikresumc.com **Phone:** (0123)-456-789

SUMMARY

To pursue an Independent Financial Consultant position where I can use my work and educational experience to prepare myself to own my own business.

SKILLS

Typing, Customer Service, Computer, Communication, Organization, Clerical, Clerical.

WORK EXPERIENCE

Independent Financial Consultant

ABC Corporation - 2012 – 2015

- Experienced of financial, administrative, and logistical leadership within manufacturing environments, with concentration in small to medium operations.
- Presented Mainly manufacturing consulting for start up or restart operations ranging from $2M to $10M.
- Provided technical support on financial development, board presentation, and supply chain enhancement.
- Manufactured financial support comprised forecasted pro forma development for internal presentation and investor review, strategic analysis of market, account reconciliation process development, capital appropriation and leadership of developing financial knowledge for senior management.
- Provided support to companies such as Elantric, Rochester, NY, a confidential beverage industry start up in St.
- Led in carrier negotiations while managing the overall renewal/marketing process.
- Contributed to enhancement of client services/sales by being well informed and maintaining a familiarity with industry trends.

Independent Financial Consultant

Delta Corporation - 2006 – 2008

- Present Boutique retirement planning firm that provides investment and insurance solutions for individuals and businesses.
- Independent Financial Consultant Leveraged existing securities and insurance licenses to establish this solo practice that delivers personalized .
- Specialize in sales of key man insurance policies for small business clients.
- Independent Broker Currently pursuing series 6 & 63 Estate Planning Asset Protection Retirement Portfolios.
- Provided private business consulting to three separate corporations; two Broker Dealers and an IMO.
- Worked with high net worth individuals with life insurance and annuity portfolios.

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- Sell and market life insurance, annuities and health products, financial planning Successfully prospect for and attain new clients via outside sales.

SCHOLASTICS

- B.S. In Business Administration

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