Investment Associate/Executive

ROBERT SMITH

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Objective

Highly motivated finance professional with expertise in relationship management, capital markets, investment management, and risk management.

Skills

Project, System Advisor Model, Salesforce.

Work Experience

Investment Associate/Executive

ABC Corporation - September 2010 – November 2012

- Invested in tech startup companies.
- Managed processes including lead generation (both investors and startups), events, customer relations, and deal screening.
- Worked with tech entrepreneurs (of primary software and mobile apps) on business strategy and investor pitches.
- Increased lead generation by which resulted in a record high of nine Angel-funded deals.
- Developed and managed the content and execution of emails, bi-monthly event invitations.
- Implemented a quarterly newsletter that increased attendance of events.
- Assisted in company re-branding re-branded collateral, logos, newsletters, and social media accounts.

Investment Associate

ABC Corporation - 2009 – 2010

- Focused on the development and management of client relationships (institutional and individual) for a financial advisory team with over $300 million under management.
- Developed and analyzed portfolio performance reports and proposals for investors.
- Responsible for initiating and creating seminar events and investor approved materials for prospecting.
- Responsible for working directly with CPAs and trading desks to develop the most tax-efficient municipal bond portfolios.
- Profiled investors and developed their financial and retirement plans.
- Developed and maintained 401k plans for large companies..
- This is Dummy Description data, Replace with job description relevant to your current role.

Education

MBA - 2010(Robert H. Smith School of Business, University of Maryland - College Park, MD)

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