

# ROBERT SMITH

## Sr. Investment Specialist

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To obtain a position with a company where may leverage sales experience, relationship management skills and background in finance, which will allow to achieve company growth objectives.

## EXPERIENCE

### Sr. Investment Specialist

#### ABC Corporation - 1996 - JANUARY 2015

- Dedicated business within Asset Management at JPM, and was responsible for both advising clients on investments.
- Adhered to their IPS, as well as partnering with a banker to acquire new assets.
- Covered most of the domestic market, and spent a good deal of traveling to visit with the existing clients.
- Responsible for adhering to the clients IPS and managing their portfolio in accordance.
- Worked with UNHW individuals and families.
- Built a dedicated business to focus on Endowments, Foundations, and various not-for-profits.
- Partnered with teams across and brought in a significant amount of new AUM.

### Investment Specialist

#### ABC Corporation - 1994 - 1996

- Responsible for all investment goals assigned to six branches of Sovereign Bank New England.
- Recognized as a regional leader in selling mutual funds, annuities and life insurance products to bank clients and small businesses.
- Conducted multiple seminars and investment focus days for bank clients and employees.
- Relationship management between myself, bank employees, wholesalers and clients enabled me to work multiple locations and cover multiple territories at times when needed.
- Acted as a mentor for the licensed bank employee program to assist in the generation of investment referrals Consistently the number 1 producer in Eastern Massachusetts.
- Ranked within the top 25 out of over 265 financial representatives nationwide The centers that I covered were the ONLY branches to consistently meet and exceed their quarterly goals.
- Developed successful training program to effectively recruit and retain licensed bank employees within the region consisting of more than sixty branches..

  


## **EDUCATION**

- B.A. in International Relations - (Syracuse University - Syracuse, NY)

## **SKILLS**

Operating Management Systems, Critical Thinking.