ROBERT SMITH

Lead Investment Specialist

Phone: (0123)-456-789 | Email: info@qwikresume.com | Website: Qwikresume.com

SUMMARY

Resourceful MBA offering progressive experience in increasing client relationships and client retention through sales and the exception handling of critical issues.

CORE COMPETENCIES

Analytical Skills, Communication Skills.

PROFESSIONAL EXPERIENCE

Lead Investment Specialist

ABC Corporation - 1996 – January 2015

Key Deliverables:

- Executed and confirmed client-initiated stock, mutual fund, options, and fixed income securities transactions in clients investment accounts.
- Drove business growth and capitalized on new revenue potential.
- Provided limited research and counseling services to strengthen client relationships.
- Effectively explained FINRA rules and regulations to clients to minimize potential violations.
- Resolved client issues on a timely basis through effective problem-solving and investment knowledge.
- Increased client retention and improved client satisfaction by resolving issues such as working with transfer agents.
- Placed numerous error-free stock, mutual fund, and options transactions each day.

Investment Specialist

ABC Corporation - 1991 – 1996

Key Deliverables:

- Provide professional and courteous customer service via telephone.
- Execute trades efficiently and accurately.
- (Equity, mutual funds and options) Interact with various departments to resolve customer problems.
- Utilize FBSI systems.
- Open new accounts and process Transfer of Assets.
- Responsible for acquiring new assets per quarterly goals..
- This is Dummy Description data, Replace with job description relevant to your current role.

EDUCATION

© This Free Resume Template is the copyright of Qwikresume.com. Usage Guidelines

ROBERT SMITH

Lead Investment Specialist

Phone: (0123)-456-789 | Email: info@qwikresume.com | Website: Qwikresume.com

MBA in Financial Management - (Johnson & Wales University - Providence, RI)

2259 Oak Street, Old Forge, New York, 13420
© This **Free Resume Template** is the copyright of Qwikresume.com. **Usage Guidelines**