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## Client Associate Resume

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### Job Objective

To obtain a Client Associate position in a company that will allow me to grow with the company.

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### Summary Skills:

Exceptional client service experience within the financial services industry  
Remarkable knowledge of direct client management including field selling and account management  
Profound ability to develop and execute strategic business plans  
Sound financial acumen with expertise in budgeting, financial planning and reporting  
Strong client service & technical skills  
Ability to multi-task while delivering superior results

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### Work Experience:

Client Associate, August 2005 to till date  
Bremer Financial Corp, Elmhurst, IL

- Assisted with the annual financial review process with associate and principal.
- Drafted client correspondence with attention to spelling, grammar and punctuation.
- Prepared expense reports, transaction approval letters and discretionary distribution memos; cash flow recaps, gifting recaps, balance sheets and deposit receipts.
- Focused on payment of individual and or fiduciary and property taxes, quarterly mailings of tax advice letters.
- Communicated with clients and other departments regarding cash and account requests/inquiries on a daily basis.
- Ensured end of day balancing.

Client Associate, May 2000 to July 2005  
Nielsen Company, Elmhurst, IL

- Prepared and maintained client deliverables and relationship information.
  - Liaised with advisors, Program Managers and MRA.
  - Corroborated survey content and verified information.
  - Created and ensured quality of research products; assist with and other compliance projects.
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### Education:

Bachelor's Degree in Accounting, Southern Wesleyan University, South Carolina, SC

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